

International Handbooks of Quality-of-Life
Series Editor: M.J. Sirgy

Muzaffer Uysal
Richard R. Perdue
M. Joseph Sirgy *Editors*

Handbook of Tourism and Quality-of-Life Research

Enhancing the Lives of Tourists and
Residents of Host Communities

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Editors

Handbook of Tourism and Quality-of-Life Research

Enhancing the Lives of Tourists
and Residents of Host Communities



Springer

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Foreword

A Nice Place to Live is a Nice Place to Visit

Of journeying the benefits are many: the freshness it bringeth to the heart,... (Persian poet Saadi). Every now and then go away, have a little relaxation,...[when back], your judgment will be surer... (Italian artist Leonardo da Vinci). You will come back from your trip, measuring it not in hours or in miles traveled, but in its happiness-value (American poet T. S. Eliot)

Through time, past savants of both East and West have written eloquently on travel and its many benefits, all enriching one's quality-of-life. Meanwhile commoners, in millions, (knowingly or not) have been experiencing these acclaimed values, as is apparent from their globe-trotting patterns. With this vast spreading, travel became tourism – indeed, a giant industry worldwide – and later its practice a popular field of investigation. Significantly, this growth and shifting pattern took place mainly recently: the amassing of tourism after World War II and its scientification during the last two decades. Within the latter period, countless studies on tourism's structure and function poured out. Now, libraries of articles, books, and references later, with over 100 academic journals continuously publishing the latest, along with thousands of universities everywhere offering bachelor's, master's, and Ph.D. degrees in tourism, still the age-old claims of the savants about the benefits of travel are unsubstantiated. While financial gains from tourism are known, its sociocultural values to the host and guest populations and its contributions to their quality-of-life are only among emerging questions, with many still unasked.

This academic volume, *Handbook of Tourism and Quality-of-Life Research*, with its appropriate subtitle, *Enhancing the Lives of Tourists and Residents of Host Communities*, is edited by three well-established scholars in our field: Muzaffer Uysal, Richard R. Perdue, and Joseph Sirgy. Featuring contributions submitted by authors ranging from iconic to emerging, it takes important strides in claiming and advancing our knowledge on this new research theme. It surveys what is known about tourism and quality-of-life and, significantly, signals what lies ahead. This contribution is both timely and important.

Generally speaking, in the past, one lived to work, while today people work to live. Also, until some years ago, when people got old, the rest was used to prepare for dying. Today, they want to live and live it up. These two practice and behavior shifts connect directly with tourism in at least two ways. One, people in addition to seeking better quality-of-life at home, expect the same – if not more – when on the move, seeking enriched experience, with “experience” becoming a popular research and practice focus in itself. Two, residents of host destinations expect better quality-of-life also through tourism nested in their communities.

For me the subject of quality-of-life and tourism goes back to the 1980s. First, along with several other colleagues, I was engaged in a longitudinal project studying the relationship between tourism and host communities in several countries. This so-called Vienna Center survey was carried out twice within 5 years. The study sought, among other things, to determine the attitude of the host communities in almost all European countries. The findings of the first round indicated that the relationship was unsettled, with the second round suggesting that their attitude had shifted in favor of tourism. In general, the host communities appeared more receptive to tourism due to its socioeconomic qualities, but without connecting these to what is called quality-of-life today. Somewhat independent from this study, toward the end of the decade, I chaired the plenary session of a conference, held in Poland, which dealt with tourism and lifestyle. Again, “quality-of-life” was not used then; but the idea that tourism enriches the lives of those who participate in it was in focus. Later, in the 2000s, I was one of the organizers of a conference on tourism and wellness, held in Mallorca, Spain. Its coverage more closely connected to the context of the ongoing discourse. This conference was followed with another in Mallorca; this one focusing on community-based branding, with the host’s quality-of-life brought to the surface. Both conferences resulted in books covering their respective subject areas. Based on these four examples, the topic has certainly evolved. But past attempts across the field have been narrow and sporadic. This handbook marks a change in favor of engaged systematic and cumulative treatment of the quality-of-life subject, for all tourism stakeholders (not tourists only), as well as for the diverse theoretical and practical ramifications it can offer.

As the handbook states, it has two principal goals. First, it aims to provide a platform for scholars to explore the linkage between tourism activities and quality-of-life for tourists and, significantly, residents of host communities, as well as the well-being of the workforce engaged in this industry. Its second aim is to lead the relationship between tourism and quality-of-life to new research questions, to plant seeds in fertile scholarly grounds, and to direct the subject to new frontiers of understanding. In this fashion, the handbook initiates and maps new paradigms of research and scholarship on the topic and in the field of tourism in general.

Subjects and dimensions explored in this 38-chapter volume are all important, but as a cultural anthropologist I pick one: the relationship between tourism and the quality-of-life of its host community. While the host community focus goes back to the early 1970s, sparked by anthropologist Valene Smith, the mainstream topics have dealt with impacts of tourism on culture and heritage mainly, including attitudes of host communities. The question of the relationship between quality-of-life and tourism is of more recent vintage. And this is precisely one of the strong footholds and the advocating strength of this handbook: taking the lead in promoting a major shift in tourism studies.

The bulk of past investigations, particularly those springing from business, management, and marketing perspectives, were tourist-centered: what tourists want to see and do, how to attract them, how to satisfy them, how to retain them, how to adjust tourism products to their liking, and the like. Tourists have been in the center, as the king, with all else in place to respond to the guest (“who is always right”), to be understood and satisfied. Recognizing that the throne is lodged in someone else’s territory has typically been alien to most studies, but not so to the present handbook. What an appraisal on behalf of the silenced host population, their culture and heritage, their environment, their quality-of-life! This is actually the way tourism should have been viewed and treated all along: home-inspired, home-based, home-grown, and home-delivered. This has been a position promoted by some socioculturally inclined scholars since the early 1970s, but now is orchestrated by the same and other researchers in this landmark publication.

With this extensive volume, the above perspectives find a grounded foundation or platform. Yes, tourism should, among other things, improve the quality-of-life of all its stakeholders; and now gears shift, firmly placing the host community and its quality-of-life into a thematic focus. “A nice place to live is a nice place to visit” is a theme that I have been advocating in recent

conferences. A community which is enriched and satisfied attracts tourists who in turn are satisfied with their visits, catered by satisfied people serving them, for improved quality-of-life for all stakeholders. Participation and cooperation of the private and public is the key, starting with the willingness of the host to become host. A destination which delivers poor quality-of-life to its own residents cannot sustain offering high-quality tourism experience. A destination which is concerned with per capita happiness of its residents has a better chance to increase tourists' per capita expenditure, while providing them with valued experience, something that today's tourists seek – something that can spring only from the local hospitality which the tourism industry “packages” in the name of the community. With informed public/private community-based policies and with locally supported/empowered hospitality experience, quality-of-life for all can be advanced – for the present and future generations of the host and guest populations.

While I have singled out the host community and its quality-of-life as a theme, this should not be understood out of context. Indeed the book covers economic, sociocultural, health, environmental, as well as quality-of-life effects. These and other aspects discussed within its covers are significant, as no dimension of tourism can be viewed in isolation. It is this diachronic and holistic treatment which has led tourism to its present frontiers of knowledge and will continue to be its driving force as the search reaches for inner layers, in themselves and in relation to the total environments in which tourism is sustained. And it is this broader and deeper perspective which 68 multidisciplinary authors from around the world have brought to life in this landmark tome – signaling tourism's homecoming.

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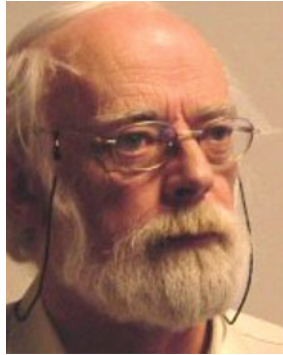
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Ruhet Genç is chairman and associate professor at Istanbul Bilgi University, Laureate Universities in İstanbul. He is also a director of three predominant touristic entities and the advisor of some major logistics companies in Turkey. He has three books in Turkish namely, *International Hotel & Restaurant Management in Relation with Human*, *Concepts and Methods of Professional Manager*, and *Concepts and Methods in Logistics and Supply Chain Management*. His business and international connections make him to live and work in three different continents, namely Asia (China, South Korea, and Taiwan), Europe (Turkey and Germany), and North America (Canada and the USA). By doing so, he is able to look at the tourism and logistics sectors from different angles. He values very much cultures where he can discover new synergies with the business and academic arena. His research interests include cross-cultural values of tourism and different aspects of tourist behavior.

Deepu V. George

Virginia Polytechnic Institute and State University, USA



Deepu V. George is a doctoral candidate in the Department of Human Development at Virginia Polytechnic Institute and State University (1880 Pratt Drive, RB XV, Blacksburg, VA 24060). His research focuses on applying systems thinking to understanding and measuring community development, capacity building, and community change processes. He is a fellow of the Institute of Policy and Governance at Virginia Tech, and a Via International Scholar with the Global Dialogue for Response Ability Project.

Ebru Günlü

Dokuz Eylul University, Izmir, Turkey



Ebru Günlü is associate professor at the Dept of Tourism Management, Faculty of Business, T.C. Dokuz Eylul University, Izmir, Turkey. Her main research interests lie in the application of managerial issues and behavioral sciences to the hospitality industry. She has also co-authored a book “*Convention Management*” and wrote a book titled “*Workplace Romance*.” In addition, she has written some book chapters like “*Leadership Styles and Motivation*” and “*Deviance Behavior*.” On the topic of “Crisis Management in Tourism,” she and her colleague Gurhan Akta have a book chapter titled “*Crisis Management in Tourist Destinations*,” which appeared in the new edition of *Global Tourism* published in 2005. They have also co-authored a conference paper “Concerning Crisis Management” presented at International Congress on Marine Tourism, which was rewarded as “the best paper” of the congress. She has also won another best research paper reward with her co-authored research, “*The Effects of Workplace Freindship on Organizational Climate: A Research of Travel Agencies in Mersin*.” She is the vice chairperson of the Department of Tourism Management at the Dokuz Eylul University, where she delivers under-graduate and post-graduate courses on human resources in tourism, management of tourism operations, convention management, and tourism sociology.

Huili Hao

East Carolina University, USA



Huili Hao, Ph.D., is the research director for the Center for Sustainable Tourism, Division of Research and Graduate Studies, East Carolina University, Greenville, North Carolina. Her research interests include impact of second home and tourism development, sustainability, community sense of place, and sustainable Brownfield redevelopment.

Heather J. Hartwell

Bournemouth University, UK



Dr. Heather Hartwell, associate professor, is a registered nutritionist and a member of the Nutrition Society. Her expertise is within the academic discipline of public health nutrition. Being part of the Centre for Well-being and Quality of Life, she has responsibility for coordinating the well-being research theme pan-university. In her duty as trustee of the Royal Society for Public Health, she is actively involved in policy decision making and contributes to advisory committees at a national level. She is engaged with the British Nutrition Society being the food and nutrition specialist on the Registration Committee and assessor for new registrants. She is a fellow of the Higher Education Academy, Fellow of the Royal Society for Public Health, and editor of the highly acclaimed *Perspectives in Public Health* journal published by Sage. As chief external examiner for the Chartered Institute of Environmental Health and examiner for the Royal Society for Public Health, she is part of the development team required to provide relevant proficient and technical guidance within the general field of nutrition and food safety. Her aim is to provide a learning environment of the highest possible quality, which is both academically stimulating and vocationally relevant. This was recognized in 2006 when she was awarded a Bournemouth University Learning and Teaching Fellowship.

Pamela Ho

PolyU Hong Kong Community College, Hong Kong



Dr. Pamela Ho is a lecturer in the PolyU Hong Kong Community College. She devoted her career in the travel and tourism industry since she got her B.A. (Hons.) degree in tourism management at the Hong Kong Polytechnic University. It was where she subsequently obtained her Ph.D. She has been active in research and consultancy projects. Her research areas cover cultural tourism, attractions, and theme parks management. She has published in referee journals and was responsible for several tourism-related consultancy projects for private companies and the Hong Kong SAR Government including the Feasibility Study on Conservation and Development of Wun Yiu Pottery Kiln Site and the Northern New Territories Tourism Development Study.

Mick Ireland

JDD, Mayor of Aspen, Colorado, USA



Mick Ireland, JDD, is mayor of Aspen, Colorado, and a two-term past member of the Pitkin County, Colorado, Board of Commissioners. He has studied, experienced, and shared across many venues the experiences and leadership role Aspen and the surrounding regions have played in addressing the many issues facing rural resort regions with high-end second home development.

Robert J. Johnston
Clark University, USA



Robert J. Johnston is director of the George Perkins Marsh Institute and professor of economics at Clark University. He received his B.A. from Williams College and Ph.D. from the University of Rhode Island. Among other appointments, he is currently president of the Northeastern Agricultural and Resource Economics Association (NAREA), on the Program Committee for the Charles Darwin Foundation, the Science Advisory Board for the Communication Partnership for Science and the Sea (COMPASS), the Gulf of Maine Regional Ocean Science Council, and is the vice president of the Marine Resource Economics Foundation. He is a natural resource and environmental economist who has published extensively on tourism economics and sustainability, valuation of natural resources and ecosystem services, and management of aquatic, coastal, and ecological resources. He has also recently co-authored *Economic Analysis for Ecosystem Based Management: Applications to Marine and Coastal Environments*, published by RFF Press.

Bryce L. Jorgensen
East Carolina University, USA



Bryce L. Jorgensen is assistant professor of child development and family relations at East Carolina University (Rivers W 335, Greenville, NC 27858). His research and theorizing focus on the capacity of families to be strong and resilient over the life course within a community context.

Soo Hyun Jun

Bournemouth University, UK



Soo Hyun Jun, Ph.D., is lecturer of tourism management and marketing in the School of Tourism at Bournemouth University, UK. She earned her Ph.D. degree in tourism, recreation, and sport management at the University of Florida and her master's degree in park, recreation, and tourism resources at Michigan State University, USA. Her current research interests are consumer behavior, information-processing strategies, information and communication technology, strategic marketing for tourism and hospitality, and experimental research methods. Her works appear in *Journal of Travel Research*, *Journal of Travel and Tourism Marketing*, *Parks and Recreation*, and several refereed conference proceedings. She was awarded the Best Illustrated Paper at the Annual TTRA Conference (2004), the Poster Award at the Michigan Land Use Summit Forum (2004), the Master's Student Research Merit Award at the Annual TTRA Conference (2005), and the Best Presentation of Student Research at the TTRA Canada Conference (2008). Before moving to the USA, Soo worked for the Division of Corporate Strategic Planning at CJ Corporation in Seoul, Korea, which focuses on food services and entertainment businesses, and the Division of Marketing at CJmall.com.

Deborah L. Kerstetter

Pennsylvania State University, USA



Deb Kerstetter is a professor in recreation, park, and tourism management and co-director of the Tourism Research Lab at The Pennsylvania State University. Her research interests lie primarily in the areas of consumer decision making in a tourism context, the impact of tourism development on cultural and social institutions, and the importance and meaning of place. In an effort to stay current, she serves on numerous tourism boards and works directly with providers interested in enhancing their strategic marketing initiatives.

Philippus Stephanes (Stefan) Kruger

North-West University (Potchefstroom Campus), Potchefstroom, South Africa



Stefan was born at Kroonstad, South Africa. He has worked at very exotic destinations in the hospitality industry. He was also the protocol manager at the Sun International Group responsible for several heads of state. After working for many years in the tourism and hospitality industry in managerial positions, he has accepted a position in the Tourism Programme of the School of Business Management, North-West University, Potchefstroom. He holds a doctorate in tourism and hospitality management. His research interests include quality-of-life, tourism and hospitality management, food and nutrition sciences, and positive psychology. He is also a licensed moderator of the Cape Wine Academy, and is a food safety auditor. He is a lifelong student of the famous culinary expert, Jamie Oliver. Since 2004, he has published various peer-reviewed articles in journals and has attended various conferences, both national and international. His hobbies include fire breathing, collecting bonsai, playing piano, clarinet and flute, and hunting. He serves on the *Journal of Applied Research in Quality of Life* as book review editor. He is currently a member of the International Society of Quality of Life Studies, the South African Chefs Association, the Federated Hospitality Association of South Africa, the National Confederation of Hunters Associations of South Africa (CHASA), and has completed his dedicated hunting license.

Dionysia Lambiri

University of Southampton, UK



Dionysia Lambiri is a research associate at the School of Geography, University of Southampton (UK), currently working on a project looking at the economic effects of large foodstore developments on small towns in England. Dionysia earned a Ph.D. in economics from the University of Reading (UK) where she also worked as a teaching fellow, teaching microeconomics, urban economics, and real estate economics. Her doctoral research, partly funded by the University of Reading, looked at urban regeneration and neighborhood dynamics in the case of Barcelona (Spain), with particular focus on residential submarkets. Her research interests lie in the fields of urban economics, housing economics, and quality-of-life studies.

Michael S. LaTour

University of Nevada, Las Vegas, USA



Dr. Michael S. LaTour is professor of marketing at the University of Nevada, Las Vegas. He earned his Ph.D. at the University of Mississippi. His research focuses on consumer memory, gender issues, and psychophysiological responses to marketing communications. His research has appeared in a variety of journals including the *Journal of Marketing*, *Journal of the Academy of Marketing Science*, *Journal of Advertising*, *Journal of Advertising Research*, and the *Journal of Business Research*.

Katie Lazarevski

University of Wollongong, Australia



Katie Lazarevski is a research associate with the Institute for Innovation in Social and Business Research at the University of Wollongong (Australia). Her research focuses on improving the managerial usefulness of market segmentation solutions for the tourism sector. In her Ph.D. thesis, she uncovered that tourism managers have difficulty in understanding the market segmentation process. She developed a formative model that tourism managers can use to assess the attractiveness of market segments. To date, Katie has (co)authored five refereed journal articles.

Xiang (Robert) Li

University of South Carolina, USA



Dr. Xiang (Robert) Li is an assistant professor at the School of Hotel, Restaurant, and Tourism Management, University of South Carolina. His research mainly focuses on destination marketing and tourist behavior, with special emphasis on international destination branding, customer loyalty, and tourism in Asia. He has worked extensively with international destination marketing organizations and companies. He has authored nearly 60 scientific publications and currently serves on the editorial boards of the *Journal of Travel Research*, *Journal of Leisure Research*, and *Tourism Analysis*. He is also a frequent speaker at numerous international and industry conferences.

Janne J. Liburd

University of Southern Denmark, Denmark



Dr. Janne J. Liburd is an associate professor and director of the Centre for Tourism, Innovation and Culture at the University of Southern Denmark, Denmark. She is a cultural anthropologist and her research interests are in the field of sustainable tourism development. She has published on national park development, open innovation and Web 2.0, tourism education, tourism crisis communication, events, NGOs, and accountability. She has conducted a number of research projects relating to competence development for tourism practitioners and tourism educators. She is the chair of the *BEST Education Network* and steering committee member of the *Tourism Education Futures Initiative*.

Patrick Long

East Carolina University, USA



Patrick Long, Ed.D., is the director of the Center for Sustainable Tourism, Division of Research and Graduate Studies, East Carolina University, Greenville, North Carolina. His research focuses on tourism planning strategies, sustainable practices in tourism, community development and resource conservation, host community adjustments to tourism development, gaming tourism, and the impact of climate change on tourism business.

Vincent P. Magnini

Virginia Polytechnic Institute and State University, USA



Dr. Vincent P. Magnini, assistant professor of hospitality and tourism marketing at Virginia Polytechnic Institute and State University, earned his doctoral degree from Old Dominion University. His research focuses on services marketing issues and has appeared in a variety of journals including the *Journal of the Academy of Marketing Science*, *Journal of Business Research*, *Journal of Services Marketing*, and the *Journal of Service Research*. He has also co-authored (with Francis Noe and Muzzo Uysal) a service encounter book entitled *Tourist Customer Satisfaction: An Encounter Approach* aimed at providing students, educators, and practitioners with a comprehensive synthesis of service theories as they apply to frontline interactions.

Jay A. Mancini

University of Georgia, USA



Jay A. Mancini is Haltiwanger distinguished professor at the University of Georgia, and head of the Department of Child and Family Development (123 Dawson Hall, Athens, GA 30602). He also is director of the Family and Community Resilience Laboratory. He is a fellow of the National Council on Family Relations and of the World Demographic Association. His empirical and theoretical work focuses on the resilience and vulnerability of individuals, families, and communities.

Gianna Moscardo

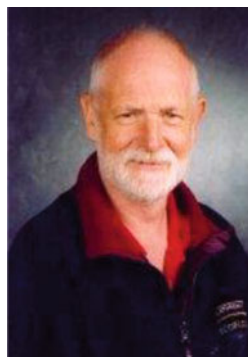
James Cook University, Australia



Professor Gianna Moscardo has qualifications in applied psychology and sociology and joined the School of Business at James Cook University in 2002. Prior to joining JCU, she was the tourism research project leader for the CRC Reef Research for 8 years. Her qualifications in applied psychology and sociology support her research interests in understanding how consumers, especially tourists, make decisions and evaluate their experiences and how communities and organizations perceive, plan for, and manage tourism development opportunities. She has published extensively on tourism and related areas with more than 150 refereed papers or book chapters. She has been invited to speak on issues related to tourism in New Zealand, South Africa, Botswana, Italy, Finland, and the USA. Her recent project areas include evaluating tourism as a tool for economic development in rural regions, tourist experience analysis, and tourist shopping villages.

Norman McIntyre

Lakehead University, Canada



Dr. Norman McIntyre is professor emeritus and director of the Lakehead University Centre for Tourism and Community Development in Thunder Bay Ontario, Canada. He has a broad international experience in nature-based tourism and leisure having taught and conducted research in Australia, New Zealand, Sweden, Japan, Canada, and the USA. His current research is focused on lifestyle migration and its social, economic, and environmental implications for transitional rural communities in Canada and elsewhere.

Bob McKercher

Hong Kong Polytechnic University, Hong Kong



Dr. Bob McKercher is a professor of tourism in the School of Hotel and Tourism Management at the Hong Kong Polytechnic University. He began his career at Charles Sturt University in Albury, NSW, Australia. Prior to that he worked in the Canadian tourism industry in a variety of advocacy and operational roles. He has wide-ranging research interests and is the co-author of *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*. He received his Ph.D. from the University of Melbourne in Australia, a master's degree from Carleton University in Ottawa, Canada, and his undergraduate degree from York University in Toronto, Canada.

Minkyung Park

George Mason University, USA



Minkyung Park (Ph.D., Texas A&M University, 2000) is an assistant professor in School of Recreation, Health, and Tourism at George Mason University. She worked at Maryland State Tourism Office before she joined Tourism and Events Management Program at George Mason University. Her research interests include impacts of tourism on communities and individuals, cultural events and festivals, globalization, and tourism behavior.

Philip L. Pearce

James Cook University, Australia



Philip Pearce was appointed as the first professor of tourism in Australia. He earned a doctorate from the University of Oxford studying tourists in Europe. He has held a Fulbright scholarship at Harvard University. He has over 150 publications and six books on tourism and supervises a large number of Ph.D. students. He is a foundation member of the International Academy for the Study of Tourism and was the chief editor of Australia's *Journal of Tourism Studies* from 1990 to 2005. His interests are in tourist behavior, tropical tourism, and tourism education.

Mike Peters

University of Innsbruck, Austria



Mike Peters finalized his apprenticeship training and worked for several years in the hotel industry. He studied at the Faculty of Business Administration at University of Regensburg (Germany) and is a graduate of the Faculty of Social Sciences at the University of Innsbruck (Austria). In his dissertation, he investigated the growth (behavior) of tourism enterprises and therefore analyzed entrepreneurial motivations in small and family businesses. In 2008, he became associate professor at the Department of Strategic Management, Marketing and Tourism at the University of Innsbruck. His main areas of research are small- and medium-sized enterprises in tourism: problems and challenges, entrepreneurship in tourism, and innovation and product development in tourism.

Rhonda G. Phillips

Arizona State University, USA



Rhonda G. Phillips, Ph.D., is professor in the School of Community Resources and Development at Arizona State University where she teaches in the tourism development and management and the nonprofit and philanthropy leadership programs. She holds professional certifications in planning (AICP) and economic and community development (CEcD). Her work with communities centers on revitalization using tourism-based development, arts and cultural applications, as well as evaluative work using community indicator systems. Fostering community well-being has been the focus of her research and service work for over 20 years.

Ige Pirnar

Yaşar University, Izmir, Turkey



Ige Pirnar (professor, Ph.D.) currently works as chair of Department of Tourism & Hotel Management, Yasar University. She achieved her M.B.A at Bilkent University (1989) and Ph.D. at Ankara University (1998). She held job postings at Bilkent University (1989–1996) as assistant director of School of Tourism & Hotel Management, vice chair of Department of Computer Aided Accounting, and vice chair of Department of Commerce & Administration. She has previously worked as part-time lecturer at METU (1993–1996), Izmir University of Economics (2004–2006), and Beykent University(2009). She has four books published in Turkish (two of them with co-authors) on topics of *Convention and Meetings Management*, *TQM in Tourism*, *Direct Marketing*, *PR in Tourism*, and is one of the editors of *Quality Management in Services*. She has scholarships for *Tourism Education in Universities* from WTO (New Delhi, 1990) and *Teaching Assistantship Scholarship* from Bilkent University (1987). She has many articles and presentations on tourism management, international tourism studies, global marketing, alternative tourism applications, hospitality marketing, and EU tourism policy, either published in national and international journals or presented at national and international conferences. She is also among the editorial member boards of many tourism-related journals, the organizing committee members, and/or the scientific board members of many tourism-related congresses.

Abraham Pizam

University of Central Florida, USA



Abraham Pizam is dean and Linda Chapin Eminent Scholar Chair in Tourism Management in the Rosen College of Hospitality Management, at the University of Central Florida, Orlando, Florida, USA. Professor Pizam is widely known in the field of hospitality and tourism management and has conducted research projects, lectured, and served as a consultant in more than 30 countries. He has held various academic positions, in the USA, UK, France, Austria, Australia, New Zealand, Singapore, Israel, and Switzerland, has authored more than 150 scientific publications and eight books, is the editor-in-chief of the *International Journal of Hospitality Management*, and serves on the editorial boards of 18 academic journals. He has conducted consulting and research projects for a variety of international, national, and regional tourism organizations. He holds a master's degree from New York University and a Ph.D. from Cornell University, and is the recipient of several academic awards.

László Puczkó

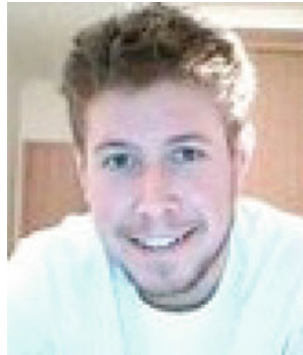
Xellum Ltd., Budapest, Hungary



Dr. László Puczkó is a managing director and head of tourism section at Xellum management consulting company. He is board member of the Travel and Tourism Research Association (TTRA) European Chapter, professor at Corvinus University, Budapest, and president of the Hungarian Association of Tourism Consultants. His main areas of expertise are in tourism research, strategy preparation, planning, and management. Based on his works, several market analyses have been prepared focusing on the characteristics of theme parks, health tourism, thematic routes, heritage tourism, attraction and visitor management, destination marketing, and impact analysis.

Jeffrey Michael Rempel

Environmental and Regulatory Manager, Alberta, Canada



Mr. Rempel is an environmental assessment and management expert. He is the founder of PhilEco Environmental Consulting (est. 1998, Inc. 2010). His interdisciplinary education and work experience provide an integrated approach (social, economic, ecological, and institutional) to the management of complex adaptive social-ecological systems. His project experiences include: contaminated sites, waste management, oil sands environmental and regulatory project management, legislation review, EIA coordination, wildlife and fisheries biology, hydrology, and hydrogeology. His excellent project management skills have developed over the past 11 years to include work plan, budget, and proposal preparation as well as field logistics and sampling. He is also proficient in a wide variety of PC applications and understands the benefits of using GIS in cross-disciplinary management. He is an effective communicator, as a scientist and to nontechnical audiences. He has experience working with various levels of government (municipal, provincial, and federal) and communities including first nations. He is a proven leader, project manager, and natural scientist with a high degree of professionalism and attention to detail.

J.R. Brent Ritchie

University of Calgary, Canada



Dr. Ritchie holds the professorship of tourism management in the Haskayne School of Business at the University of Calgary. He also serves as chair of the University's World Tourism Education and Research Centre. He was elected as the founding chair of the United Nations World Tourism Organization's Tourism Education Council in 2001. In 2004, he was awarded the UNWTO Ulysses Prize for "his scientific contributions to the theory and practice of Tourism Policy, as well as his leadership over the past 25 years in the area of tourism education and research." He has published extensively on tourism and related topics in leading journals in the field. He is co-author of numerous books, most notably: *Tourism: Principles, Practices, Philosophies* (now going into its 12th edition and widely regarded as the leading introductory textbook in the field of tourism); *Travel, Tourism and Hospitality Research: A Handbook for Managers and Researchers*; *Consumer Psychology of Tourism, Hospitality and Leisure-Vol 2*; *The Competitive Destination: A Sustainable Tourism Perspective*, has been endorsed by the United Nations World Tourism Organization as a theoretical and practical framework for effective destination management. He currently serves on the editorial review boards of numerous leading journals in the field. His active research focuses on destination competitiveness, destination branding, destination management, the environmental impacts of visitor behaviors, and the tourism experience.

Amir Shani

Ben-Gurion University of the Negev, Eilat Campus, Israel



Amir Shani is a lecturer in the Department of Hotel and Tourism Management in Ben-Gurion University of the Negev, Eilat Campus, where he teaches courses in ecotourism, tourism ethics, and marketing research. He earned his Ph.D. at the Rosen College of Hospitality Management, University of Central Florida, where he also served as an instructor for undergraduate courses in tourism management and guest services. In addition, he served as faculty in the Disney Scholars Program. He specializes in tourism and hospitality ethics, as well as current issues in tourism marketing, such as destination image and loyalty. His articles have appeared in *Journal of Travel Research*, *Journal of Sustainable Tourism*, *Cornell Hospitality Quarterly*, *International Journal of Contemporary Hospitality Management*, as well as other tourism and hospitality journals.

Manisha Singal

Virginia Polytechnic Institute and State University



Dr. Manisha Singal is assistant professor of strategy in the department of hospitality and tourism management in the Pamplin College of Business at Virginia Tech University. She received her Ph.D. in strategic management at Virginia Tech in 2008. She teaches strategic management in the hospitality industry at the undergraduate, graduate, and Ph.D. level. Her research interests lie in the area of corporate governance and firm strategies and topics related to the hospitality and tourism industry. Several of her papers have been nominated/selected for best paper awards at the Academy of Management Meeting, Family Enterprise Research Conference, and Strategic Management Society Conference. She has published papers on tourism area life cycle and consumer brand perceptions in the restaurant industry. She serves on the editorial review board of *Family Business Review* and as an ad hoc reviewer for several journals like *Cornell Quarterly*, *Journal of Business Research*, *International Journal of Hospitality Management*, *Journal of Hospitality and Tourism Research*, and *Tourism Analysis*.

Melanie Smith

Corvinus University of Budapest, Budapest, Hungary



Melanie Smith is an associate professor and researcher in tourism at Corvinus University, Budapest, where she is developing an M.A. in tourism management. She has been a tourism academic for almost 15 years. She was director of B.A. Tourism and M.A. Cultural Tourism Management Programmes for several years at the University of Greenwich in London. She is also chair of ATLAS (Association for Tourism and Leisure Education), which has around 300 members in 70 countries. She is author of several books and journal articles with research interests in cultural tourism, urban regeneration, health and wellness tourism, and quality-of-life.

Patricia A. Stokowski

University of Vermont, USA



Patricia A. Stokowski (Ph.D., University of Washington, 1988) is a faculty member in the Rubenstein School of Environment and Natural Resources, University of Vermont; she previously worked at Texas A&M University and the University of Colorado-Boulder. Her work focuses on social and cultural aspects of outdoor recreation behavior, and tourism development impacts. She is the author of *Riches and Regrets: Betting on Gambling in Two Colorado Mountain Towns* (1996; University Press of Colorado) and *Leisure in Society: A Network Structural Perspective* (1994, Mansell Press). E-mail: Patricia.Stokowski@uvm.edu

John E. Tunbridge

Carleton University, Ottawa, Canada



John E. Tunbridge is visiting professor, School of Business (Heritage Studies), University of Brighton, UK, and emeritus professor of geography and environmental studies, Carleton University, Ottawa, Canada. He studied at Cambridge and Bristol Universities and, via a preliminary post at Sheffield University, came to Carleton in 1969. He has held visiting positions at the Universities of New England, Armidale, Australia; Portsmouth, UK; and Natal, Pietermaritzburg, South Africa. He has written extensively on heritage, tourism, and related issues for some 35 years, with particular reference to Canada, South Africa, and Central Europe. His recent work has focused on naval heritage, primarily in the contexts of Bermuda and Malta. His longstanding co-authorship with Gregory Ashworth notably includes *Dissonant Heritage* (1996) and *The Tourist-Historic City* (1990 and 2000).

Timothy J. Tyrrell

Arizona State University, USA



Timothy J. Tyrrell is professor of tourism development and management and director of the Megapolitan Tourism Research Center at Arizona State University. He earned a Ph.D. from Cornell University in agricultural economics in 1979 after earning an M.A. in economics from the University of Tennessee and B.A. in mathematics from the University of South Florida. He served as professor of tourism economics at the University of Rhode Island from 1978 until 2005, and as professor and founding director of the Megapolitan Tourism Research Center at Arizona State University from 2005 until the present. He has conducted market research, sustainable development, and economic impact studies of tourism in many parts of the world. He is a member of the Travel and Tourism Research Association and the International Association of Scientific Experts in Tourism. He serves on the Leadership Council of International Association of Tourism Economists. His article co-authored with Rob Johnston “A Dynamic Model of Sustainable Tourism” won the Charles R. Goeldner Article of Excellence Award in 2005 for top article in the *Journal of Travel Research*.

M. Mithat Üner

Gazi University, Turkey



Mithat Üner is a professor in the Department of Marketing at Gazi University, Ankara/Turkey. Mithat Uner received his B.S. in business administration in 1983 from the Hacettepe University, and his MBA from Gazi University in 1986 and M.S. in international business 1989 from the University of Wisconsin at Madison. He received his Ph.D. in business from Gazi University. He completed his postdoc studies at the University of Pisa in Italy. Most of his research centers around services marketing, marketing strategy, positioning, and internationalization of firms. He was the dean of School of Tourism at the Gazi University for 6 years. He has been serving as a consultant to the Ministry of Tourism in Turkey. He is married and a father of two.

Manuel Vanegas

Adjunct Professor, University of Minnesota, Saint Paul/Minneapolis, USA



Dr. Vanegas is breaking ground on the hypothesis that tourism development offers a well structured road through which developing countries can both effectively reduce poverty and at the same time enhance the level of economic growth. His main research activities are in the areas of tourism economics and quantitative analysis with applications in poverty reduction, economic growth, marketing effectiveness, and demand analysis. He served as tourism policy advisor to the President of Nicaragua (2002–2005), UN chief technical advisor to the government of Aruba (1994–2002), and chief of party macroeconomics to the government of Uganda (1989–2003). He is an adjunct professor in the Department of Applied Economics, University of Minnesota, Saint Paul/Minneapolis, USA. He received his Ph.D. from the Department of Applied Economics, University of Minnesota.

David Weaver

Griffith University, Gold Coast, Australia



Dr. Weaver is currently professor of tourism research at Griffith University, having held prior academic appointments in Canada, Australia, and the USA. He is a specialist in ecotourism, sustainable tourism, and destination life cycle dynamics, and is the author or co-author of more than 100 refereed journal articles, books, and book chapters. He sits on the editorial boards of eight academic tourism journals and has recently delivered invited keynote addresses in South Korea, Mexico, South Africa, and Sweden.

Klaus Weiermair

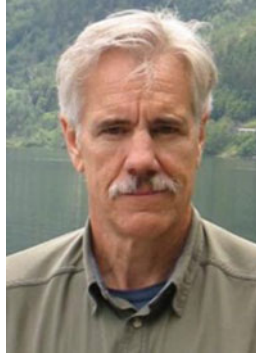
University of Innsbruck, Austria



Klaus Weiermair was educated at the Vienna School of Economics of Business Administration and earned his master and doctorate degrees at the same institution. He served as professor and from 1991 to 2004 head of the Institute of Tourism and Service Economics at the University of Innsbruck. Until recently he was full professor at the Department of Strategic Management, Marketing and Tourism at the University of Innsbruck. His previous appointment was, among others, professor at the Faculty of Administrative Studies, York University. His areas of research include tourism management and entrepreneurship, organizational development, and quality measurement and management. His publications can be found in well-known journals, such as *Annals of Tourism Research*, *Journal of Travel and Tourism Marketing*, or *Journal of Management Studies*.

Daniel R. Williams

Rocky Mountain Research Station, Fort Collins, Colorado, USA



Daniel R. Williams is a research social scientist with the Human Dimensions Research Program, Rocky Mountain Research Station, in Fort Collins, Colorado, USA. His research examining the impact of globalization on the meanings of tourist landscapes has appeared in the *Journal of Environmental Psychology*, *Journal of Leisure Research*, *Norwegian Journal of Geography*, and *Journal of Sustainable Tourism*. He recently co-edited (with McIntyre) *Multiple Dwelling and Tourism: Negotiating Place, Home and Identity*, published by CABI. His current research examines community vulnerability to landscape change to identify the adaptive capacities that make them more resilient in the face of such change.

Eunju Woo

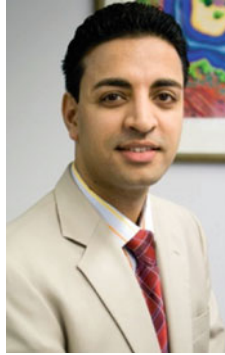
Virginia Polytechnic Institute and State University, USA



Eunju Woo is a Ph.D. student currently working in hospitality and tourism management at Virginia Polytechnic Institute and State University. She completed her master's degree in the Department of Recreation, Sport and Tourism from University of Illinois at Urbana Champaign in 2009. Her research interests include destination marketing, tourist behavior, and quality-of-life.

Venkata Yanamandram

University of Wollongong, Australia



Venkata Yanamandram, Ph.D., received his doctorate from the University of Sydney, and is a lecturer in the Marketing discipline at the University of Wollongong, where he teaches marketing principles and services marketing at both the undergraduate and postgraduate levels. His research has been published in the *International Journal of Services Industry Management* (currently published as *Journal of Service Management*), *Managing Service Quality*, *Journal of University Teaching & Learning Practice*, and *Australasian Accounting Business and Finance Journal*. Venkata.yanamandram@uow.edu.au

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Chapter 1

Prologue: Tourism and Quality-of-Life (QOL)

Research: The Missing Links

Muzaffer Uysal, Richard Perdue, and M. Joseph Sirgy

Tourism is a major socioeconomic force in today's world. The study of tourism and its increasing growth as a field of study can be largely attributed to tourism's ability to create significant economic benefits and jobs in destinations. Tourism and its socioeconomic impacts have become highly investigated phenomena of today's academic world.

Both consumers and governments invest heavily in tourism experiences and development with the goal of improving the quality-of-life of destination residents. As societies and individual consumers, we invest heavily in vacations and holiday travel. As a result, both travel volume and expenditures have grown to become one of the major forces of modern society. Leisure and travel are increasingly viewed as necessary to one's emotional well-being and both mental and physical health. Whereas in the past one lived to work, increasingly, we now work to live. Our quality-of-life is increasingly defined not by our work, but by our leisure and travel.

Recognizing the size and economic potential of tourism, governments throughout the world are investing heavily in the development, promotion, and operation of tourism destinations. Both public policy and government expenditure have been focused on creating a tourism economy with the goal of enhancing the quality-of-life of destination area residents. Initially, the success of these policies and investments was largely measured in economic terms, e.g., tourist expenditures, tax revenues, and the number of jobs created. More recently, we have begun to measure success not only in such economic terms but also relative to the impacts of tourism development, both positive and negative, on the physical environment and in the well-being and happiness of area residents.

Beginning in the 1960s, there has been plethora of academic research examining both the effects of leisure and travel on an individual's emotional well-being and quality-of-life and on how tourism development impacts the quality-of-life of destination area residents. Interestingly, these two bodies of work seemed to have evolved with relatively little interaction or cross-fertilization.

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In this book, we have attempted to attract chapters from leading scholars in both areas with the goal of beginning a comparative analysis and, ideally, a sharing of concepts, theory, and methodologies.

Certainly, within the tourism literature, research examines the effects of tourism development on host communities, and their residents are the more developed body of work. There has been a substantial number of studies examining tourism as an economic development strategy and from the perspective of its social and environmental consequences, its demand–supply interactions, and its realized and perceived tangible and intangible benefits to different community stakeholders. Research examining the tangible benefits of tourism with their associated costs tends to be limited to economic measures and physical changes of destination environments at the macro level. The tangible benefits and costs of tourism development tend to be reflected in various studies that examine the “objective” indicators of quality-of-life (QOL).

Implicit in the concept of objective QOL indicators is the notion that increases in tourism in the community should increase tourism jobs in the community as well as sales of tourism goods and services. Further, increases in tourism jobs within the destination area should play a significant role in increasing the economic and consumer well-being of the destination residents. Increases in jobs and sales should also generate more tax revenues for the destination, which in turn allows increases in public sector spending. Public sector spending enhances residents’ economic, consumer, social, health, and environmental well-being.

With respect to the negative objective QOL impacts of tourism, the concern focuses primarily on the possibility that increases in tourism will lead to greater reliance and dependence on tourism and, as a result, both poor quality and over development of the tourism resource. Heavy reliance on tourism may cause changes in the environment and subsequent economic and social instability. Significant decreases in the quality and value of the tourism economy can, in turn, cause significant tourism job losses as well as loss of sales to tourism providers, creating a downward spiral. Loss of jobs and sales leads to loss of tax revenues. Loss of tax revenues means decreases in public sector spending, which in turn adversely affects the well-being of the destination residents. In addition, heavy reliance on tourism and uncontrolled tourism development may over time also bring undesired structural changes to the destination community that result in deterioration of QOL due to crowding, traffic congestion more pressure on existing services, even loss of local identity and culture.

In relation to these positive and negative QOL states, one may identify two sets of objective indicators across a community time span. These indicators can be categorized in terms of process and outcomes. Outcome indicators are those directly related to community residents’ QOL, including:

- Economic effects (wage, household income, unemployment, unskilled workers, literacy rates, consumer cost of living, prices of goods and services, cost of land and housing, property taxes, number of retail stores, and the like);
- Social effects (educational attainment, crime rate, quality of the public transportation system, number of recreational parks and programs, housing quality, teen pregnancies, quality of local services such as police and fire protection, utilities, and roads);
- Health effects (e.g., infant mortality rates; reported incidents of certain diseases such as tuberculosis, polio, and venereal disease; infectious and serum hepatitis; life expectancy; and number of healthcare facilities in the community); and
- Environmental effects (land pollution, air pollution, water pollution, crowdedness, traffic congestion, and the like).

The process indicators of quality-of-life are the tourism-related factors and conditions affecting resident QOL, including:

- Number of jobs in tourism-related firms
- Amount of sales of tourism-related firms

- Tax revenues generated from tourism activities and firms
- Leakage due to savings and money lost to outside visitors
- Quality and number of attractions in the community
- Open space and degree of accessibility to visit and participate

On the other hand, the assumed intangible benefits of tourism are more difficult to quantify and are usually expressed in the perceived importance of impacts of tourism as seen differently by a wide variety of stakeholders, representing both the demand and supply of tourism. These benefits represent the “subjective” indicators of quality-of-life. The concept of subjective QOL indicators implies that community residents’ overall QOL is a function of their satisfaction in their major life domains, namely their economic, consumer, social, environmental, and health domains. The greater the perception of well-being in these life domains, the higher the perception of their overall QOL would be. To the extent that residents’ perceptions of tourism in their community affect their life domains, tourism impacts their overall, subjective QOL. For example, residents’ perception of the economic impact of tourism in their community may affect their overall perception of their own economic well-being. Similarly, residents’ perception of the social, environmental, and health impacts of tourism in their community may affect their overall perception of their own social, environmental, and health well-being.

More recently and slowly, we are beginning to see a noticeable number of studies examining tourism and its connection with and contribution to the QOL of individuals as travelers and participants in leisure activities. A diverse body of tourism and leisure research is evolving, and a wide variety of research questions are being examined, relating individual life happiness and well-being to tourism issues such as tourist satisfaction, quality of tourism experiences, medical tourism and wellness, and residents’ quality-of-life (Budruk and Phillips 2011; Payne et al. 2010; Bushell and Sheldon 2009; Jennings and Nickerson 2006; Pearce et al. 2010; Smith and Puczko 2009). Tourism needs to address the issue of whether or not it meets both the basic and growth needs of the residents for it to contribute to the quality of residents’ life. Access to resources, empowerment which enables individuals to make choices into desired actions, and creating opportunities for individuals and local businesses should be at the heart of discussion in every aspect of sustainable tourism development. Naturally, measuring the perceived quality and the equality of the exchanges related to tourism activities in a destination is critical to the quality production of tourism experiences for both residents and tourists. If one traces the product concept from the early 1950s to the service concept in the late 1970s and early 1980s and the experience economy in the 1990s, it seems that there is a natural progression from the experience economy to extraordinary, meaningful, and co-creation of experiences. How that progression affects both the conception of tourism and individual well-being and overall life satisfaction is an important but relatively unstudied research question.

Furthermore, there is an increasing focus on the value of tourism as a tool for social and economic policy. The value of tourism has transitioned to focus more on non-economic measures such as QOL and satisfaction, and there has recently been an increased focus on abstract forms of value such as perceived QOL and sustainability (Perdue et al. 2010). The effectiveness of tourism to facilitate and support QOL policy imperatives such as poverty reduction, revitalization of community heritage and culture, preservation and protection of cultural and natural resources, and sustainability is an increasingly important research agenda.

The concept of sustainability in the context of tourism involves both intra-generational and inter-generational equity, striking a balance between the enjoyment of the attributes and resources of a particular place and maintenance of its inherent character and charm for future generations. The long-term objective is to both provide for quality touristic experiences and avoid excessive exploitation of resources and to promote preservation for future generations. This implies that QOL research must focus on the QOL of both current and future generations. This certainly requires a practice of shared social and corporate responsibility on the part of both tourists as consumers and suppliers as providers of tourism goods and services.

Early tourism development focused primarily on opportunities for economic development with little regard for externalities. Over the years, as awareness of environmental, cultural, and social issues increased, tourism developers and government officials have recognized a need to address the effects of tourism development on the subjective well-being of host community residents. In today's tourism world, communities as destination places are better informed of the consequences of tourism and development activities and are thus better prepared to monitor and manage tourism for quality experience and benefits. We see an increasingly competitive tourism environment characterized by more specialized and individualized tourist product designs aimed at providing more rewarding and varied tourism experiences while at the same time reducing the negative impact of tourism on the natural and cultural resources of communities. This is due to the need not only to preserve resources but also to protect the attributes that facilitate the competitiveness of a tourism destination and improve the QOL of tourists and residents. The concepts of destination competitiveness, sustainability, and QOL are intimately interdependent on each other and also conceptually and naturally linked. However, these linkages have not been fully and systematically examined and certainly are worthy of both theoretical and practical further attention in the field of tourism and allied disciplines such as hospitality, recreation, and leisure.

The goal of this handbook is twofold. The first goal is to provide a platform to bring a group of scholars to further establish the assumed linkages between tourism activities and QOL from the perspectives of both the community residents and tourist participants and explore the potency of tourism to improve the well-being of those that are involved in different aspects of the tourism phenomenon. The second goal is to bring the importance of the existing linkages between tourism and QOL to the forefront of tourism research. By doing so, we hope to initiate a new paradigm of research that could contribute to and enrich the scholarly tourism literature. One of the difficulties we ran into was coming up with a good title for Chap. 1 and Chap. 38 that would reflect the goals of this handbook. Although we entertained a number of options, we preferred the idea of one of our contributors about using "missing links" in both Chap. 1 and Chap. 38 titles. Accordingly, and having cleared this with the author of chapter 13 on tourist motivation, Graham M. S. Dann, we decided to adopt it for the titles of Chap. 1 and Chap. 38. The main advantage of course in employing such an expression is that it encourages an agenda of exploring connections rather than merely assuming their presence.

The audience for this handbook involves both academic and industry professionals interested in QOL issues in travel and tourism. With respect to the academic market, the scholarly literature in tourism has been expanding and proliferating exponentially for the past three decades. The effects of tourism on host community residents have long been a major research topic. While relatively less scholarly research has examined the effects of tourism on individual well-being, we see this as a growing area of work.

With respect to the industry professionals, tourism policy and decision makers have long focused on the effects of tourism on community residents and, particularly, their support for tourism development and pro-tourism policies. More recently, this work has extended to understanding the effects of tourism on community resident well-being. Finally, we are beginning to study tourism as a policy tool toward such societal goals as sustainability, competitiveness, poverty reduction, and resource preservation. Further, industry professionals are increasingly interested in understanding the science and scientific approach that allows them to develop better marketing and managerial programs designed to enhance the QOL of tourists and participants. A lower level of quality-of-life of residents of a destination would not be able to produce a better quality of tourism experiences. Moreover, quality tourism experiences need to be interpreted within specific contexts and by specific "actors" as well as reflect the temporality of the tourism settings in which they are constructed (Jennings and Nickerson 2006). Much evidence exists that enhancing tourists' well-being is good for business in the sense that highly satisfied tourists engage in repeat

business and further promote business through positive word-of-mouth communications. As such, this handbook is designed to provide a state-of-the-art reference book that both tourism academics and practitioners will view as indispensable. A general theme of this book is that the chapters regardless of their focus attempt to establish the existing and assumed relationship between quality-of-life and tourism as a socioeconomic phenomenon and academic endeavor. Our contributors, 68 scholars with 38 chapters, come from a number of theoretical perspectives, interdisciplinary interests, and research approaches to their topics of investigation.

A handbook like this would not have been possible without generous and full support from our outstanding contributors. We owe a great debt to our friends and colleagues from around the globe for their diligent work on the chapters and prompt revisions.

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Part I

Tourism and QOL

Chapter 2

Relationships and the Tourism Experience: Challenges for Quality-of-Life Assessments

Philip L. Pearce

Introduction

Out of the millions of people we live among, most of whom we habitually ignore and are ignored by in turn, there are always a few who hold hostage our capacity for happiness, whom we could recognise by their smell alone and whom we would rather die for than be without. (de Botton 2009:101)

These remarks typify the clear view in the psychology literature that our relationships with others are powerful influences on our happiness, the well-being we experience and the overall quality of our lives (Argyle 2001; Diener and Biswas-Diener 2008; Cohen and Janicki-Deverts 2009). The importance of relationships extends beyond our everyday existence and penetrates our holiday and travel experiences. This chapter addresses the influences of relationships, the tourism contexts in which they occur and the role of these interactions on the well-being of travellers. It will describe, in turn, the relationships tourists have in large groups and crowds as well as in smaller specialist travel parties and styles. Travel relationships for gay men and for women in general will be highlighted. The relationships of interest include those with and amongst travellers as well as the usually briefer contacts and experiences with service personnel and the visited local community. These descriptions will then be examined from the perspective of research on stress reduction. Additionally, new conceptual schemes in positive psychology will be incorporated in the discussion for the insights they offer into the processes linking relationships and quality-of-life assessments. An important and final section of the chapter considers the implications of studies of relationships for how we assess and how we might re-assess happiness, well-being and quality-of-life in a tourism context.

The Importance of Relationships in Travel

A scattered array of sources and resources attests to the importance of relationships for tourists, travellers and adventurers. The relationships on which we will focus are those occurring during the tourism and travel process, but it is worth noting that links with those left behind also structure the experience (White and White 2007). The mobile communication technologies of recent

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decades enable travellers to maintain contact with many of those who matter in their world. Nevertheless, tearful scenes of departure as well as joyful reunions at the world's transport terminals are a visible indication that travel is both a relationship threatening and affirming process. As Bowen and Clarke (2009) report, travel holds the possibility of personal growth and change, so the prospect that the departing friend, lover or family member may return somehow altered or changed is realistic (see also Noy 2004). In addition, travel can be dangerous, and the contemplation of loss, either physical or psychological, underwrites the sweet sorrow of parting. On the travellers' return, pre-existing relationships may be altered, and as Maoz (2005) suggests, the distance travelled in young adults' inner psychological journeys may be more important for their subsequent life than the physical distances they have covered.

Other evidence confirms the importance of relationships to the travel experience and well-being. Pearce and Lee (2005) view close relationship building as a core motive in their travel career pattern model of motivation, thus repeating a common theme highlighting the social needs of travellers (cf. Crompton 1979; Mannell and Iso-Ahola 1987; Driver et al. 1991; Klenosky 2002). In addition to suggesting the importance of enhancing close relationships, such as amongst family, friends and emerging partners, the travel career patterns model suggests that the building of closer relationships with the people in the visited community becomes a more important middle-order motive as travellers become more experienced (Pearce 2005). The argument that relationships matter to travellers is clear, and the logic to be applied for quality-of-life considerations is that the fulfilment of these important motives should affect the travellers' satisfaction and well-being.

For some groups in particular, travel provides the time, the new venues and the opportunity to affirm their identities and potentially promote a sense of well-being. For example, Waitt and Markwell (2006) suggest that gay tourism needs to be understood not only for its commercial appeal but for the insights it provides into the power relationships which constrain or facilitate gay travellers' lives. Their study of gay destinations suggests that there are discourses for approving and encouraging some types of gay relationships, and by implication the well-being of those travellers. Identities for women and the satisfaction they experience on holidays as influenced by their relationships have also become key tourism research topics (Swain and Momsen 2002). This research area too affirms the interdependence of relationships, travel and quality-of-life. A consideration of the significant ways in which relationships influence travel for gay males and for women will be pursued in some detail in a later section.

A further and final consideration amplifying the importance of considering relationships and their role in tourism's influences on the quality-of-life lies in the highly affective and emotional impacts associated with dealing with others. Difficulties in ongoing relationships are regularly considered to be among the most stressful of life's events, while the commencement of new close relationships can generate the most euphoric of feelings (Argyle and Henderson 1985; Armstrong 2002). While it is challenging to study these issues among travellers, some initial evidence suggests that when holiday makers' relationships are in difficulty and arguments prevail, the enjoyment of the destinations is seriously compromised (Pearce and Maoz 2008). Several commentators have followed the observations reported in the classical poetry of Ovid, that travellers change their sky not their soul when they cross countries (de Botton 2002; Bowen and Clarke 2009). It can be added that either implicitly or directly, tourists' relationships travel with them as well.

Linking Relationships, Tourism Contexts and Quality-of-Life

The diverse sources noted above, together with other arguments deriving from theories about stress, social support and intimacy (Diener and Biswas-Diener 2008:53–55), suggest that an organised consideration of the role of relationships should be part of any tourism-linked quality-of-life

Fig. 2.1 The links among relationships tourism contexts, the outcomes for tourists and quality-of-life considerations

The groups/ persons with whom tourists may formulate relationships	The tourism contexts which modify the relationships	Generic outcomes of the relationships for the tourists	Highlights of the tourists' relationships of particular importance to quality of life considerations
Other Tourists	Travel in large groups/crowded situations	Intimacy/deep friendship Companionship	Hedonic pleasure: fun excitement immediate and reflective pleasure
Members of the visited community	Intimate and special groups	Stimulation/learning	Personal development including: altruism self-awareness identity knowledge
Service providers	Individual travel	Assistance/security	
		Discomfort/threat Conflict/harm	

appraisal or textbook. Such a discussion requires some structure. The components to be linked in this structure are the people with whom the relationships are occurring, the tourism context which might modify those relationships and the outcomes of these interactions which matter to quality-of-life considerations. Figure 2.1 outlines these links.

There are multiple pathways which can be traced across the columns identified in Fig. 2.1. Two quite varied examples illustrate the patterns which can be considered. For example, by reading across the leading entries in the second row in Fig. 2.1, a link can be traced for the contacts and relationships among tourist travelling together in large groups, their development of intimate relationships and hedonistic fun. While not necessarily of major importance to the quality-of-life for everyone, there is undoubtedly a subset of travellers for whom hedonistic relationship outcomes are highly desired. For these kinds of travellers, developing intense and probably short-lived holiday relationships are success stories informing their well-being. Accounts of tourists in such party destinations as Ibiza or in spring breaks illustrate the pathways described (Harris 2005). Many other entries in Fig. 2.1 can be combined to produce other quality-of-life outcomes. The contacts and relationships that volunteers as a special travel group forge with members of local communities can lead to altruistic behaviours which are richly fulfilling and add meaning to people's whole life beyond their travel activities (Lyons and Wearing 2008). Travel then and the relationships developed during holidays promise both hedonistic and eudaemonic outcomes to participants (cf. Seligman et al. 2005).

Additionally, it is important to deal with a further component – that of the nature and kind of tourists being considered within the organising diagram. Galani-Moutafi (1999), among others, has observed that writers and researchers in tourism tend to describe the experiences and issues for a kind of mythical average tourist, usually male, often from a developed country and apparently travelling without others (see also Pritchard and Morgan 2000; Wilson et al. 2009). In the following review, an attempt will be made to specify the kinds of tourists pertinent to the immediate discussion. Importantly, the consideration of the relationships for the groups of people who are often under-represented in general appraisals – women, those with disability and those with different ethnic backgrounds or sexual preferences – will be purposefully included in key parts of the review.

The sources of evidence used in the following sections are eclectic and diverse, partly because tourism researchers have not always had the backgrounds, resources or interests to pursue some of the topics to be considered. It is therefore necessary to collate some philosophical and literary material as well as resources from psychology research to build the discussion.

Travel in Large Groups/Crowded Situations

One defining aspect of relationships and experiences with others which is associated with mass tourism and crowded settings is the notion of a group identity or collective response to entertainment. Urry (1990) provides a corrective account to the largely North American research reporting negative links between crowding and visitor experiences by asserting that some forms of tourism crowding have positive connotations. The roots of this more positive appraisal of being in a crowd considerably pre-date Urry's postmodern assessment. Le Bon (1895) identified the negative and fearful affective experiences of being swept up in a crowd but also allowed for some positive elements. In some of the more positive tourism crowding scenarios, examples include participating in full moon dance parties or witnessing spectacular environmental events with others, the bonds between individuals are radically altered. In the analysis of affectively charged crowds, individuals see their own pleasure being reflected in the faces of others, there is casting aside of personal differences and a surge of mutual excitement (see also Ryan and Collins 2008; Pearce 2008a, b). Like ecstatic football supporters enjoying a victory (Harris 2005), tourism crowds at key events may respond in unison with the same applause, exclamations and praise for what they are witnessing. The phenomenon has been seen as involving the loss of personal identity and is best explained by the emergence of norms within the group that are all encompassing (Milgram 1977). Like participants in primitive rituals, the visitors, at least for short periods, may feel a part of a larger common humanity (Meares 1973). For the most orgiastic crowds, the music, the repetitive dance rhythms as well as alcohol and other drugs may add to the excitement and loss of individual awareness. For more restrained gatherings such as a visit to a Russian ballet performance or a New York musical, it is the anonymity of darkness and the focus on the performance while still being in the presence of others which produces the strong sense of a positive collective feeling.

Studies of visitors' peak or best experiences regularly include instances of these feelings of attachment and selflessness in the positive, emotionally charged crowd (Noy 2005; van Egmond 2007). Such experiences are not of course confined only to tourism contexts, but it appears that when they occur, the memory of the event is powerful. Three unpublished examples drawn from the researchers' records of tourists' experiences across a 30-year time span provide strikingly similar examples (Pearce 1982, 1990; Pearce et al. 2009). Together, the examples add to the view that the relationships in certain crowded settings are of relevance beyond the holiday. From 1980 data, a young New Zealand tourist describes a social encounter in Spain:

a bit reluctantly I went to a bullfight in Malaga. It was packed with people. Late in the afternoon with the sun cooling down and the sky glowing there was a magnificent calm as thousands of people watched the bullfight battle intently. I just got caught up in it all. Beautiful enthusiastic people living their culture which might be taboo elsewhere but I cheered when they did and will remember the day forever. I was not a Kiwi, not a visitor, not even a pretend Spaniard –just a part of the human race appreciating life that afternoon.

Another best experience, somewhat more succinct, comes from the first of a series of backpacker studies in 1990:

The dance parties in Thailand –so great, people all together no status no pretend just all in all fun for as long as you can last. This is what life should be like.

And a further record in the same vein from 2009:

I am not big on crowds usually but I went with a friend to an indoor heated spa centre in Korea. It was massively crowded but everyone was in the water splashing and playing-no language needed just relief from that outside cold and enjoying being playful. When stripped to our swimming clothes and seeking a good time we are all alike really- something I will remember back in formal life.

Many researchers in tourism who now access travel blogs and Web sites to study travellers' reactions to their journeys will probably be able to identify similar positive appraisals of transformative group experiences in their data (cf. Woodside et al. 2007; Schaad 2008; Morgan and Watson 2009).

Apart from the happy crowd scenarios depicted in these accounts, it would be easy to suggest that the relationships formed when tourists travel in large groups are the least likely to lead to positive implications for the travellers' quality-of-life. Such views have accompanied the criticisms of tourism for a long time and are characterised by the perspective that tourists have little opportunity to interact with the local community. Additionally, the service personnel whom they meet are socially distant, and at best, their fellow travellers merely serve to authenticate their choice of the destination rather than providing fulfilling relationships (Huxley 1925; Rosenow and Pulsipher 1978; Urry 1990). It is perhaps useful to bear in mind for our discussion of relationships that mass tourism is in fact a theoretical construct formulated by tourism researchers. It features prominently in the writing of those who adopted a cautionary view of tourism (Jafari 2005:1–2). While there are clearly large numbers of people in many locations and they are most probably transported there by budget airlines and accommodated in large-scale resorts, these numbers are made up of numerous discrete groups with existing bonds (van Egmond 2007). The relationships which underlie their experiences may be confined to their existing contacts and partners, but the holiday opportunity can potentially deepen those key relationships. In this sense, the presence of many other people located nearby who are earnestly pursuing the same endeavours is somewhat irrelevant.

McKercher and Bauer (2003:4), commenting on the role of close relationships, romance and sexual behaviour in mass tourism, observe that consensual, non-pecuniary relationships dominate the world of holidays even though analytical attention has been drawn to commercial sex and its exploitative components. The view that the intimate times afforded by holidays can provide solid benefits to its participants has recently received some supportive evidence from the field of travel medicine. Westman and Eden (1997), Westman and Etzion (2001) and Etzion (2003) established that stress levels of resort-based holiday takers were reduced for approximately a month after returning to work. The benefits in tourism and holiday taking are arguably even somewhat more powerful and durable than what these specific studies suggest. It is important to remember that holiday experiences have both an anticipatory and a reflective phase. That is, holidays may have a positive function in that people reduce stress by looking forward to them as well as reflecting on them. Some solid evidence that a consistent pattern of holiday taking confers or is at least associated with physiological benefits also comes from a number of longitudinal or panel data studies reported in the medical literature. Eaker et al. (1992) reported less cardiovascular disease amongst women who took more holidays, and Gump and Matthews (2000) showed improved longevity for holiday-taking men. Other studies by Strauss-Blasche and colleagues suggested that the health benefits of holidays, both psychological and physiological, were greater when holiday takers were getting good sleep, socialising in a warm climate and having enough time to attend to their needs and focus on their well-being (Strauss-Blasche et al. 2005). The question to be asked of these findings is as follows: Is it the relationships which are being enhanced on holidays which are assisting these outcomes or is it a combination of decreased work pressures and other factors? The answers are not entirely clear, but further research is worth doing because the key to developing positive

health studies lies in recommending those activities and combinations of behaviours which can do the most good (Seligman 2008). Some further studies which consider the roles of relationships among sub-groups of travellers partially assist in providing answers to these questions.

Travel Among Specialists Groups

The focus in this section identifies links among special groups of travellers, the relationships they forge and change and the larger consequences these relationships have for the quality-of-life. Volunteer tourists as well as backpacker travellers will be considered. Research reviewing the issues and quality-of-life considerations linked to travelling for gay men will be a key part of the discussion. Further, women travellers more generally will be considered. Undoubtedly there are other specialist groups who fit well into this category, but the selected categories highlight different kinds of relationships. The varied consequences will serve here to sketch out some of the diverse life enhancing benefits engendered by relationships associated with travel.

Volunteers and Backpackers

Volunteer tourism involves a different kind of exchange relationship than many other forms of travel activity. The tourists still pay for travel, accommodation and food but provide labour to the visited setting or community over a concentrated time period (Lyons and Wearing 2008). Sometimes, purely altruistic motives are ascribed to volunteer tourists. In this view, volunteer tourists are effectively an ethical body of people ameliorating the historical exploitation and environmental mistakes on which their affluent society has been built (McGehee 2002; Pearce and Coghlan 2008). Reinforcing this view is the observation that volunteer tourism appears to be culturally sanctioned particularly in terms of the public endorsement of gap years for students in the United Kingdom and elsewhere. There are of course community groups, scientific organisations, members of communities and business stakeholders all involved in volunteer tourism, and the effects of the practice on their worlds have been questioned more closely (Raymond 2008; McGehee and Andereck 2008). In the context of the present discussion on quality-of-life and life-changing issues for tourists through relationships, the specific interest in the volunteer tourism studies lies in the personal rewards and in-depth contact which the tourists experience. Some commentators have seen these rewards as necessary or integral to the success of volunteer tourism, while those who read volunteer tourism as more of a noble pursuit, possibly linked to or akin to a religious commitment to serve others, tend to downplay the interpersonal and psychological rewards (McGehee and Santos 2005).

Wearing (2001) reports several kinds of potentially enduring personal development benefits for volunteer tourists undertaking projects in Costa Rica. Four categories of benefits with the potential for lasting quality-of-life implications were revealed. Many of the outcomes recorded were attributed directly to the relationships the volunteers experienced. The first of the four categories was labelled personal awareness and learning and relates to an expanded sense of personal character strengths forged through social interaction and observation. A second category was identified as interpersonal awareness and learning and was highlighted by perceived improvements in effective communication. It included a better understanding of others. A third

category was entitled confidence and emerged through the volunteers working cooperatively with community members to solve challenges. A fourth identity-linked outcome was labelled self-contentment. In describing this category, Wearing reports that many of the participants saw themselves after their travels as more relaxed, more emotionally comfortable and generally more peaceful. These qualities and views were described as the result of the opportunity to review their well-being in a novel, interactive context where life issues are freely debated.

The outcomes identified in these studies of volunteers can be related to the learning experiences of other travel groups. Young budget travellers on extended holidays with flexible itineraries are known as backpackers in Europe, Asia and Australia. This group has been studied in terms of how much they feel they have learned from travelling (Noy 2004; Pearce and Foster 2007). In the northern Australia study conducted by Pearce and Foster, a diverse sample of backpackers from many countries travelling for extended periods was surveyed. The backpackers provided responses to a questionnaire on their perceived skill development. The skills used in the questionnaire were extracted from the backpackers' own travel blogs as well as skills described in the formal educational literature. Four groups of backpackers were identified using a factor-cluster approach built on travel motivation items. There were consistent differences amongst these clusters in the amount and kind of skill learning perceived to have taken place. In particular, high thrill-seeking younger males were seen to develop fewer generic skills, while less socially oriented older females reported the highest generic skills acquisitions revolving around independence, self-evaluation and resource management. These skills were not so clearly linked to this group's travel contacts with others, but for one of the remaining two groups, the links were clear. The high-involvement social group perceived themselves as developing a considerable range of skills, including 'dealing with pressure, emotions and stress' as well as the skills of 'self-confidence', 'teamwork' and 'risk taking'. A final small cluster of serious-minded general interest travellers were shown to develop planning and forward thinking skills as well as linguistic skills forged through their communication efforts.

The large number of travel stories and internet account used to frame the questions in this study strongly reinforce the view that it is the travellers' social contacts which feature heavily in shaping the learning process. The core results and achievements of this study mirror the findings reported in the literature concerning the skills and learning experience of other young travellers. The self-confidence and problem-solving skills were also reported in Gmelch (1997). Similarly, the skills of being mindful and communicating better were described by Hansel (1998), while leadership through planning, organising, decision-making and teamwork reflects characteristics portrayed in the work of Kuh (1995). Further, flexibility (Byrnes 2001), cultural awareness and linguistic skills (Desforges 2000; Oddou, et al. 2000) and risk taking (Hunt 2000) were all skills reported in the Australian backpacker study in line with these previous efforts.

The larger implications of these travel learning studies (including the research on volunteers considered here and in other Chapters in this volume) are that the experiences extend beyond the duration of the travel. In some instances, the skills acquired were perceived as relevant to future employment. But at other times, the diverse remarks made by travellers indicate that the implications are more about how they will choose to live their life. Adopting this view, it can be suggested that some travel can be seen as its own kind of educational institution. Pearce and Foster, following a suggestion of one of their respondents, labelled their paper as exploring the University of Travel. De Botton (2002) provides comments consistent with this notion but stresses that exposure to other people and places forms a chaotic curriculum. Few would disagree given the juxtaposition of tourists' activities and the diversity of other travellers and social contacts which can be developed. The broad perspective though is that travellers do learn a range of skills, they can develop new life perspectives and much of this happens through their relationships. The learning benefits of leisure have been established for some time, and it now seems appropriate to claim

that tourism studies are building a similar case for the lifelong implications of travel for at least some kinds of specialist travel groups (cf. Roggenbuck et al. 1991).

Disability and Travel Relationships

The importance of disability as a factor affecting relationships is considerable. The relationships which disabled people have with their caretakers are often characterised by routine acts of managing basic skills and life functions. Travel opportunities can create events to be anticipated, enjoyed and reflected upon, thus potentially adding meaning and variety to the lives of caregivers and their dependents. Disabling conditions are either congenital or acquired with either acute or insidious onset. They may be characterised by a single event or be degenerative over time. Disabling conditions involve hearing, vision and mobility problems as well as intellectual and psychiatric disorders. Some sources suggest that between 5% and 20% of the population are disabled (ESCAP 2000). Future projections now indicate that by the year 2025, there will be 573 million persons with a disability globally. Nevertheless, advocates who simply assert that the disability market is large and growing have not been able to see their vision of better tourist experiences realised through more disabled people travelling nor are there more businesses responding imaginatively to such travellers' needs (Darcy 1998; Elliott 2000).

It can be suggested that some of the problems in fostering quality-of-life issues for disabled travellers are due to a lack of understanding of the growing disability phenomenon in a tourism context. In particular, our information base for action is weak. A number of individuals with a disability have written first-hand accounts of their own travel experiences (for example, Patching 1990; Kaufman 1995; Parry 1995), but these papers usually adopt a simple descriptive style, rather than providing a basis for general action. In addition, quite a few public sector organisations have commissioned studies documenting access to accommodation and national parks (Darcy 1998). The approach taken here has been an *etic* or externally imposed set of assumptions about what matters to the people with differences. Additionally, studies of the supply sector such as that of McKercher and colleagues (2003) have found that travel agents are largely ignorant of the needs of people with disabilities, which leads to overt or subtle discrimination.

The limited information on participation rates, opportunities and accessibility issues does not indicate a lack of importance. The scant literature that does exist suggests that persons with a disability face a number of barriers to participation in tourism. Barriers include: intrinsic (internal) – lack of knowledge, ineffective social skills; environmental (external) – attitudes, architectural and transport barriers; interactive (communication) – communication challenges, skill incongruities; and economic – the affordability of travel (Smith 1987; Murray and Sproats 1990; Patching 1990; Muloin 1992; Kaufman 1995; Venedig 1997; Darcy 1998; McKercher et al. 2003; Yau et al. 2004; Packer et al. 2007). It has also been suggested that people with disabilities tend to go through a process before they become travel active (Yau et al. 2004). Packer et al. (2007) postulated a 'Process of Becoming Travel Active' which they claimed was a six-stage process, intricately related to the personal/disability context and the environmental/travel context. They advocated that understanding this staged and complex process provides insight into ways to increase active participation in tourism.

It is apparent from these considerations that the subtle and detailed quality-of-life considerations pertaining to travel parties including disabled travellers have yet to be attempted. The focus on the physical access is undoubtedly important, and the area appears to be primed for detailed studies emphasising quality-of-life assessments. It is proposed here that the stress-reducing and relationship-building advantages of travel noted amongst other groups should be targeted areas of study in forthcoming disability research linked to tourism.

Queer Travellers and Relationships

As de Lauretis (1991) initially pointed out, the choice of terms to discuss the variety of sexuality preferences and relationships in contemporary society can commit researchers to views and ideologies of which they are only partly aware. Her solution was to devise a new approach, 'queer theory', and to use the word queer to suggest that the study of homosexuality should not be the analysis of minorities but a study of knowledge systems and social practices that organise society and affect everyone's quality-of-life (Seidman 1996). These remarks therefore require researchers and authors to be specific and to focus on exactly which groups are being considered as well as how they are described. Further, there are associated requests in the academic literature to avoid confirming what has been labelled the hegemonic masculinity prevailing in tourism studies (see Swain 2002:4–5). In this spirit, the following section considers male gay tourists not as a mere minority to embellish the chapter but because the role of travel in shaping their quality-of-life introduces issues relevant to the wider generating and receiving societies.

One of the key concepts considered in research on gay males and tourism is that of identity. The driving notion here for quality-of-life studies is that when individuals are comfortable with who they are, that is have a positive perception of their own identity, then their quality-of-life and sense of well-being is improved. Harris (2005) suggests that the master identities people once received, such as being members of a social class, an ethnic group or through a clear set of sex roles, have been replaced in postmodern societies by more fluid identities. Many of these newer fluid group memberships are shaped by consumption patterns since there is a key argument that contemporary identities are a performance, a property of what people do and how they make choices.

It is perhaps worth specifying here the link between analysis of action and actors' awareness of identity issues, including gay identities. Travellers may be very aware of identity issues, or identities may be covert and only appear in a surprising way. For example, it is sometimes surprising for first-time international travellers to be repeatedly identified by their nationality and treated accordingly. This process creates a new awareness of one part of their identity which was essentially hidden in their home environment. Further, for many people, there is not a daily consideration of their identity and a worried concern about who they are. Instead, there are choices made and behaviours expressed, followed by public and interpersonal reactions to those behaviours. Identity is then conceived as the sum of the feelings about how one views belonging to groups. It is derived from public performances and linked to public approval or disapproval of these performances.

The links here to travelling and relationships for gay male tourists are documented in detail in the work of Waitt and Markwell (2006). The opportunity to move out of one public social circle and into new and possibly more liberal settings permits new behaviours and facilitates experimentation. Travel to both famous centres of gay culture as well as to more private and exotic locations offers the possibilities for gay males to develop relationships which they may not have the confidence or opportunity to undertake in their home setting. This argument is familiar territory for tourism researchers and highlights the concepts of liminality and thresholds popular in the anthropology of tourism studies (Turner and Turner 1978; Graburn 1989; Nash 2007). Waitt and Markwell observe that the tourism industry scripts for gay males can be liberating, but ironically, such approval processes can also be underpinned by a new restrictive orthodoxy. The authors suggest the issues are as follows:

The tourism industry helps retain the romantic myth that sexuality can subordinate patriarchy and racism. Yet in practice gay utopia is fashioned to meet the needs of the select few, those imagined as good homosexuals... (Western, white, not so young professionals from metropolitan areas) (2006:256)

In keeping with queer theory, Waitt and Markwell recognise many forms and divisions among gay male travellers. These sub-groups include quiet domestic couples, older singles, adventurous

and confused younger travellers and professionals transgressing from their usual heterosexual lives. There are also flamboyant performers, disabled gays, ethnic gays and individuals variously described as transsexuals or people in transition. Their work referring to this broad compass of males includes information on travellers to Eastern Europe, Russia, Egypt, Thailand, Australia and South Africa. The studies and analyses highlight two forms of travel which have a particular bearing on identity issues and in turn people's sense of well-being. Travel to well-known gay destinations will be considered here along with the public staging of gay pride parades.

Waitt and Markwell show that travel opportunities to the better-known and gay-friendly destinations offer a new kind of space for men where they can negotiate their sexual and personal well-being with local people or with other gay travellers. Much of the fascination of these key destinations appears to stem from the fantasy elements and myths of sexual prowess as well as the practices and attractiveness of certain groups. For example, in Thailand, the ready availability of some Thai boys as prostitutes appeals to some newer travellers. The fascination and fantasies here extend to encounters with katoeys (the Thai label given to the recognised third sex, some of whom are males in transition to being female). Other locations where there have been long-standing tolerant reactions to gay males and attractions and services for this group include San Francisco, Amsterdam and Sydney (Johnston 2005; Waitt and Markwell 2006). Harris (2005) suggests that all identities are entered in stages and people progress from peripheral to core membership. For gay male tourists, iconic tourism destinations are the classrooms where they can learn the complexities of being gay.

The analysis of gay pride parades in Scotland, Australia and New Zealand by Johnston (2005) supplements similar work by Waitt and Markwell confirming that tourism offers a learning experience in developing gay identity and a sense of well-being. She observes that the acceptability of gay pride parades to communities has grown. The active tourism promotion of the events, particularly in Sydney, now constructs the parade as a flamboyant spectacle able to be enjoyed by a receptive and predominantly heterosexual crowd. In Johnston's view, the subversive political threat to the well-ordered male society which alternate sexualities can generate is tamed by the management and promotion of the event. For individuals participating in the experience, however, and some of these participants are travellers, there is a group bonding atmosphere and assertions of like-minded solidarity for enjoyment and well-being which exist outside of the political context. Either participation in or watching a gay pride period while on holiday may not be the peak of the gay travellers' life, but attending such events can function as a career step in feeling pleasure and enjoyment through a public acceptance of identity choices. Following Harris (2005), it can be argued that travel is pivotal to the quality-of-life of many gay males since it affords distinctive steps in the career. In particular, travel enables new forms of gay behaviour to be explored. It can also assist individuals negotiate the difficult task of how openly they will display their lifestyle choice in their own milieu. Without the relationships developed and enhanced by travel, it can be suggested that for many gay men, their worlds would be more limited, the transitions they make and enact more difficult and their quality-of-life diminished.

Women Travellers

In introducing studies of women travellers, some of the same kinds of remarks as were formulated to discuss gay tourists apply. Again, there is a compelling need to recognise diversity and to avoid covert ideological judgements and stereotypes. Perhaps the reason most of the researchers who have contributed to this field are women reflects the insidious ease with which assumptions and masculinist ideologies can inform research writing by men on this topic (see Swain 2002). A strong component in this tradition of exploring the worlds of female travellers has been the use of

qualitative and interpretive techniques (cf. Phillimore and Goodson 2004). A particular advantage of the interviews, conversational studies and the use of memory work has been its independence from etic and prescribed versions of questions and scales which can too easily frame the ways people are allowed to report their experience.

Selanniemi (2002) emphasises that for many women with partners and children, the contrast between life at home and life when travelling is not necessarily very great. He refers to this as a reduced gap between the normal and liminoid phases of travel stressing that the continued obligations to look after and nurture the welfare of others pursues many women. Pearce (1982) cited an account demonstrating the power of these pressures:

We went to Burleigh Heads with plenty of money, rented a nice house and invited my parents-in-law. At this stage we had a daughter 9 months old and I was 3 months pregnant. The in-laws had a good relaxing time while I felt like Cinderella preparing most of the meals, doing all the washing up and in between looked after my baby. The beautiful sunny days went unnoticed. (1982:135)

The case demonstrates that for some women, certain kinds of holidays can provide few benefits. Small (2002) has investigated some of the more positive possibilities through what she refers to as memory work, effectively detailed recall by women of different ages about their travel biographies. The results of her studies indicate that women travel in different ways: some with whole families, others with one child and others with friends, while some find solo travel to be the most intensely fulfilling. Small summarises the reactions of her interviewees as follows:

While it was reported that sharing time together as a family and having common experiences was a positive experience of holidays, the discussion focussed on the delights of holidays without children or holidays in which the children could be off 'doing their own thing'. In referring to holidays without children one woman explained that it is not just a question of physically distancing yourself from the children, "your mind needs to leave them behind as well". The women stressed that they had to feel the children were safe before they could enjoy their absence. (2002:29)

Small also notes that the traditional means of getting feedback from tourists regarding their experience may not be appropriate for women. The implications of this statement suggesting as it does that there are special relationship factors to measure will be reconsidered in a later section of this paper.

In the introductory remarks to this section, it was noted that researchers can sometimes generalise and consider situations to be homogeneous when they are most probably not. One way in which this can appear in research lies in assuming that couples are reasonably content and the relationships stable. Pearce and Maoz (2008), basing their analysis on the way close relationships are represented in novels about travellers, suggest that the holidays test the quality of some relationships allowing for positive (as well as negative) consequences for their quality-of-life. Grayling (2005) in what some would undoubtedly describe as a rather direct, brutal view of love relationships suggests that travel might be driven by the demands and stresses of relationships.

He suggests that

whatever name is best appropriate to the reason why a couple stick together through routines of domestic life, moving groceries and children about at frequent intervals and watching too much television, it is not love... (it) is a species of intermittent anaesthesia, in which numbness makes almost bearable the anxious boredom of parenthood, and the tensions, provocations and annoyances of living squashed against another person year after year in a small space. (2005:44).

If Grayling is at all accurate in his assessment of couples and hence the needs of women (and men) in relationships to take holidays, it would tend to explain the push for solo travel or at least travel independent of other family members. Selanniemi's analyses of the transitions which occur in holidays to release these kinds of close interpersonal stresses encompass four kinds of change. He argues that women find it harder to enter these transitional phases than do men. He suggests that the sunlust tourists with whom he is familiar – essentially Northern European

travellers going to Mediterranean countries – are involved in spatial, temporal, mental and sensual transitions. In particular, Selanniemi argues that women find it difficult to make the mental transition; that is leave behind the place and time of everyday life and enter the timelessness of the South. These observations are in close accord with the findings reported by Small. Of additional interest is the transition labelled sensory by Selanniemi. He refers to this change as the features of the trip that stimulate our senses and heighten our awareness of sensory inputs. For the residents coming from Scandinavian countries, especially after physically austere winters, the luxuriant summer in the South can be a multisensory treat, a view expressed over the years by novelists and poets from Chaucer to D.H. Lawrence. Small suggests that the sensory transitions are of particular importance to all women and can evoke strong and very pleasant memories of past holidays, youthfulness and optimism. The appeal to a broad array of sensory experiences may just be the immersion pathway women travellers need to realise fully the benefits of holidays which social roles and obligations can act to prevent.

The potential combination of sensory experiences and holiday locations has been a topic for several researchers seeking to understand romance tourism (Pruitt and LaFont 1995). The terms is usually employed to distinguish between those relationships which women travellers undertake to enjoy the company of and sometimes intimacy with men at the destination and more direct forms of commercial sex. Herold et al. (2001) suggest that these consensual romantic relationships are widely available in a number of destinations and can benefit women's self-esteem. In making these assertions, it is worthwhile noting that the women have the power and the money, and to some extent, they control the intimacy of the liaison. De Albuquerque (1998) has suggested that these relationships are little more than prostitution which serves women, but this perspective underestimates the benefits to the women of the attention, flattery and companionship which accompany these encounters. A view that these relationships matter to some solo women and their overall well-being, in particular, can be developed from the research findings which demonstrate their willingness to return to the same situation on future holidays to rekindle that relationship or establish others of a similar nature (du Cros and du Cros 2003).

Solo Travellers

Georg Simmel, a foundation figure in sociology studies, suggested that the outsider or stranger is a unique figure in the social composition of society (Simmel 1950). In particular, he observed that strangers visiting or passing through communities received a unique array of confidences since in-group members typically feel freer to express deep-seated concerns and discuss issue of a confidential nature without the fear of reprisal. There is also reciprocity of intimacy involved here for solo travellers. When travelling alone, individuals are able to use the opportunity of being transient figures to explore their views and values. While confidential exchanges are not limited to solo travellers, the very act of travelling alone predisposes most people to seek the company of others on some occasions. Compared to couples, for example, the solo traveller does not have the familiar social support when assistance is required or conversation needed. Undoubtedly, solo travel informs some of the relationships already discussed in the previous categories. Meares (1973), the very well-travelled Australian psychiatrist, summarises the special features which apply to solo travellers:

there is a security in these situations. It comes from a kind of anonymity which surrounds the traveller; and we unconsciously feel we can test out our incompletely formulated ideas in a situation that does not really matter. (1973:170).

An additional and little-mentioned component of solo travel is its inherent freedom, possibly what can be described in the terms of positive psychology as full autonomy. Individuals travelling

alone and exploring the world this way can seek their own pleasures without compromises with others. They can eat and drink what they like, interact as little or as much as required and ultimately devote themselves to the selfish pleasures of the journey. Diener and Biswas-Diener (2008:47–49) present an extended version of this scenario where the traveller is not only alone but is without all versions of social contact. They then use this extreme example to highlight eight reasons why relationships (and this embraces relationships while travelling) matter. This work is similar to the core benefits described in Figure 1 which was based on the earlier work of Argyle (2001). Diener and Biswas-Diener's categories are presented in this section as they form a convenient summary of why relationships matter in life and in travelling (Diener and Biswas-Diener 2008:53–55). They suggest that relationships allow us to experience love and intimacy in their many forms which is widely recognised as a key to a successful life (de Botton 2005). Relationships are also seen as supporting individuals through difficult times, and in fact, the mere presence of others can be soothing. The diversity of others helps satisfy our curiosity and raises possibilities about how to live which we may not have contemplated in isolation. In this sense, relationships and the experience of them through travel can be a basis for our innovation and creativity. Additionally, relationships link us to others through identity formation and help us feel we belong to larger and supportive entities. A final benefit for overall happiness and well-being is that others help us laugh. Like the many forms of intimacy, humour can make many situations more tolerable as well as extremely enjoyable, thus promoting health and well-being (Solomon 1996). The processes underlying and explaining these outcomes will now be considered in more detail.

Explanations

There are potentially two powerful explanatory systems which help account for why relationships formed during travel can assist well-being and the travellers' quality-of-life. Initially, they will be presented separately, but it is important to also recognise that recent work suggests an interaction between the approaches presented. The first area of study concentrates on the physiological advantages of having others around to reduce stress, while the second set of explanations links positive relationships to positive emotions and their beneficial role in the course of life.

A programme of work by Sheldon Cohen and colleagues (Cohen 2005) has demonstrated that two measures – social integration and social support – have consistently positive and beneficial relations with health. Social integration refers to having a diverse social network such as when one's identity is secured by a set of well-established group ties and identities. It is represented in the work already reviewed on identities. Social support is more immediate and considers the availability of others to help people cope in stressful situations. It is exemplified in some of the studies of backpackers' social interactions and travellers' interaction with local communities. In a detailed programme of health-related studies including infecting willing and paid respondents with forms of the cold virus and then observing their physical symptoms under controlled conditions, Cohen and colleagues experimentally established strong social influences on physical health (Cohen et al. 1997; Cohen et al. 2000). This kind of work supplements and extends much previous longitudinal and cross-sectional survey research linking social life and health. In particular, the findings from Cohen's work revealed that persons with more diverse networks, that is those who are better integrated socially, were less susceptible to disease. The researchers believe that stress disrupts endocrine-mediated regulation of the proinflammatory cytokines (Cohen 2005:130). Stress is hypothesised to interfere with the production of the cytokines by interfering with the signals to turn off the immune system's response to the virus. This produces an overabundance of 'resistance' in terms of strong flu symptoms such as congestion and nasal discharge. In related work, Cohen established that unstable social support conditions, particularly where the level of affiliation of the participants was low, resulted in poorly developed immune responses.

Cohen and Janicki-Deverts (2009) suggest that to understand how these social influences may be working, we need to develop more studies of the roles of social control and pressures, the regulation of emotions and our expectations of control.

Two kinds of initial links can be proposed. The first has been identified from the earliest times and is known as 'katabasis' – the kindness of others manifested in simple ways (Grayling 2005). For the troubled traveller, the relationships which provide immediate support in terms of food, money or other problems solved are greatly appreciated and clearly formative in reducing stress. The second pathway takes us in to the arena of emotional states and the role of positive emotions in health.

Again, using a series of studies which exposed participants to the rhinovirus or Influenza A virus, Cohen et al. (2006) studied the prevailing emotional style of individuals while controlling for a suite of other demographic and personality profile variables. Those who suffered the most from the induced colds were characterised by a negative emotional style (anxious, hostile and depressed). By way of contrast, those with a positive emotional style (typically being happy, lively and calm) had less severe physical symptoms and reported less distress. Diener and Biswas-Diener (2008) suggest 'it is difficult to emphasize how important Professor Cohen's findings are' (2008:32). The implications of this work reach beyond common myths and individual stories. It can now be firmly suggested that relationships have the great potential to improve our moods and the resulting positive emotions assist our health. There are, though, further links and advantages in this system. Positive emotions have a particular capacity to enlarge our perspectives and approach to the world. This perspective, again supported by solid experimental evidence, has been termed the 'broaden and build' theory of positive emotions (Fredrickson 1998, 2001). The approach can be seen as particularly relevant to thinking about the benefits of tourism experiences. The approach suggests that a set of positive emotions such as being interested, joyful, enthusiastic and excited, while being separate and distinct, share a common potential to grow human capacity. More specifically, Fredrickson argues:

all share the ability to broaden people's momentary thought action repertoires and build their personal resources, ranging from physical and intellectual resources to social and psychological resources. (2001:219)

In this view, being joyful and enthusiastic are not only hedonistic states valued in themselves but also enriching conditions which predispose people to seek more information, reach out to others, better understand the world and foster resilience to difficult times. This research is at odds with bland and popular everyday assertions that tough times and emotions help build one's character. The evidence is that they do not, as they narrow attention and restrict external information and opportunities. Results from a number of experimental studies where people in different emotional states behaved in these broadening, resilience building ways support Fredrickson's model (Folkman 1997; Folkman and Moskowitz 2000; Fredrickson and Levenson 1998).

In the context of this chapter and our concern with reviewing tourism-linked relationships and their role in well-being, there is a spiral of positive influences and reinforcing systems in these explanations. Relationships and positive emotions reduce stress and promote health. Being healthy and having positive emotions expands travellers' views of the possibilities of their holiday experiences and predisposes them to investigate new relationship opportunities and networks. The spiral of good relationships supporting health coupled with the role of positive emotions and the further embellishment of relationships are all contributors along the pathway to tourists' enhanced quality-of-life. In some ways, there has been a broad even glib suggestion for a long time that these processes exist, but it is the recent detailed medical and experimental psychology work which has thoroughly identified some of the links. As Seligman (2008) and Somnez and Apostolopoulos (2009) suggest albeit in slightly different contexts, there is a further need for multidisciplinary teams to research positive health, and tourism in particular can be a natural laboratory for fuller investigation of these processes.

A recurring theme in this review is the need to be sensitive to differences among groups and types of travellers. Nearly all of the studies conducted on the relationships – health–well-being links – reported in the above programme of studies have been undertaken in North America. It can therefore be asked do these kinds of links extend to individuals and travellers from other cultures? It can be suggested that there is an affirmative answer to this query but that some of the details are different. For some time, researchers assessing emotions have been aware of cross-cultural variability in the values given to certain kinds of emotions. Observant travellers have noticed, for example, that a number of Asian cultures value relaxed and calm emotional states rather than more exuberant feelings (Meares 1973:31; Hansen 1988:45). Diener and Biswas-Diener (2008:141) report studies contrasting representations of happiness in children's books in Taiwan and United States. Hot or excitable positive emotions were the most favoured in the North American works, whereas calm, contented and low arousal aspects of happiness were common in the Asian texts. While the specifics of the emotional states may be different, it can still be argued that the role of emotions in underpinning well-being remains common (Argyle 1999).

In addition to the international variability in preferences for emotional states, there are widely reported differences in collectivist versus individualistic cultures. It is again wise to be cautious about neat binary classifications of people in general and travellers in particular. Not only do individual differences exist but cultures change over time, a not trivial point when it is appreciated that the principal renditions of this collectivist–individualist distinction was developed some years ago by Triandis (1972, 1990) and Hofstede (1980). Pearce and Moscardo (2004) have provided empirical evidence that simple east–west or individualist–collectivist distinctions in describing the experiences of visitors in Australia are overwhelmed by substantial variation within respondents from western and eastern cultures. To the extent that a single broad distinction between individualistic versus collectivist cultures retains some power (Clark 1990), the approach does argue for a different appreciation of relationship in travellers' well-being. Diener and Biswas-Diener (2008) suggest the following:

Collectivists, focussed as they are on group harmony are more likely to feel good when the group they are a part of is getting along well..... Individualists on the other hand are more likely to feel good when their uniqueness is exercised or singled out for praise. Individualists tend to become irritated or frustrated when they are forced to place their own desires on the back burner in favor of the needs of others. (2008:134)

Assessing Quality-of-Life

There are several challenging assessment difficulties for quality-of-life research arising from this review of travellers and their relationships. These complexities include individual versus collective assessment, self-assessment versus external assessment and the timing of any appraisal process. The focus of these considerations is on the travellers' well-being rather than any impacts and influences on other travellers, members of the local community and service personnel. The quality-of-life implications for those with whom our travellers interact are additional topics considered in other chapters of this volume.

At several points in this review, the issue of the well-being of the individual versus the collective well-being of the travel party has been raised. The dominant tradition in satisfaction research and in appraising the experiences and lasting benefits of travel has involved a focus on individuals. Diener and Biswas-Diener (2008) report an instance where as researchers they could not get an Indian respondent to offer a personal view of her happiness – her stated position was that her well-being was entirely an outcome of how well she was contributing to the quality-of-life of others. It is possible to suggest a regular and fundamental way to re-assess satisfaction and

well-being in tourism studies. In addition to asking individuals to report on their own satisfaction and appraise their own outcomes, it is suggested that items should regularly be added to survey and interview processes which seek the presumed satisfaction of other travel party members. The collection of both kinds of data should enable new indices of well-being to be determined and the empirical power of solo appraisals versus the value of assessing the perspective on travel companions assessed. Additionally, some hybrid measures of travel outcomes developed by integrating these measures may be even more insightful. It is envisaged that some of this work can be done with structured measurement scales incorporating these new assessment items concerning the satisfaction and well-being of others. In this work, it will be necessary to gauge the importance of others to the individual. In some ways, the proposed procedures are analogous to the assessments made linking attitudes and intended behaviours in the theories of reasoned action and planned behaviour (cf. Fishbein and Ajzen 1975; Ajzen 1992). In the present proposal, however, the measures are reflective rather than anticipatory.

Qualitative research procedures also have a major role in the better assessment of quality-of-life issues when dealing with the topic area of relationships. There is of course a great deal of sensitivity amongst some respondents in discussing relationships. These concerns, together with the social desirability issues surrounding the reporting of one's contacts as diverse, successful and rewarding, push researchers to rely on subtle forms of assessing relationships and in turn well-being. Several possibilities appeal. The use of naturally occurring records such as travel diaries, travel blogs and autobiographies are all likely to contain information of interest to researchers. Pressman and Cohen (2007) provide an example of using autobiographies and assessing those records with word count programmes to record the number of social ties and statements made by the writers. They established in a detailed study of over 300 autobiographies that a greater use of social words expressing social relationships was linked to the longevity of the authors. It is easy to suggest a ready transfer of these approaches and a focus on relationship issues to travel blogs which have already become a resource for tourism researchers (Gretzel et al. 2008).

Face to face interviews can still play a role provided some conditions are satisfied. If close rapport can be established with travellers through participation in activities, then topics such as relationships and quality-of-life can be explored in conversational interviews. As an example, some of Maoz's work on backpackers has provided insights into traveller relationships through the participant observation and associated interview processes (Maoz 2005, 2006). There also appears to be some special advantages in focussing on the recall of sensory moments in eliciting detailed and personally rewarding memories for travellers (Small 2002; Selanniemi 2002). Memory work built around the way in which travellers come to perform or create their tourist experience are emerging with the use of photographs and props being employed to stimulate recall and associated personal benefits (Baerenholdt et al. 2004). Accessing the meaning of experiences through a focus on describing activity participation might be a useful approach going some way towards the suggestion of Baerenholdt et al. that the tourist should be 'left behind' in tourism studies and the systems of tourism performances and networked relationships studied instead. The content and the communication patterns of the social communication tools such as Facebook also appeal as contemporary resources for researchers to consider the representations and cultural meanings given to relationships and well-being (White and White 2007).

A challenge in assessing the value of tourism experiences, including those heavily dependent on relationships to travellers' quality-of-life, lies in the issue of the timing of the measurement. It has been argued that tourism involves learning about oneself and the world. Learning though requires reflection and different outcomes from learning experiences can be predicted according to when that learning is assessed. For pragmatic reasons, many of the learning assessments in tourism and leisure studies are immediate or at least conducted while visitors remain on holiday and are accessible to researchers (Roggenbuck et al. 1991). Additionally, travel experiences

can be predicted to have cumulative effects so that the value of any one holiday may not be great, but when juxtaposed with subsequent trips, new understandings emerge and the implications for how people view themselves may change. Diener and Biswas-Diener (2008) highlight a similar point when they assert that the satisfaction and recall of holidays may be more about a combination of peaks and views formed at the conclusion of the trip rather than an averaged assessment of all the events of the experience. Peaks which are particularly significant may be remembered for a long time. An emerging idea in happiness research is the value of savouring, which is defined as the active appreciation of the present or a focussed reminiscence of previous peak experiences. Savouring, like mindfulness with which it may be linked, involves a detailed recall, examination and synthesis of experience to maximise the value of memory and positive ways of thinking (Langer 2009). These kinds of processes have been demonstrated to improve the well-being of respondents. A complication arises here for researchers whose efforts at eliciting memories of travel events may be inadvertently boosting the savouring process and elevating the significance of travel in respondents' views of their well-being. Some of these pressures and dilemmas for researchers again suggest the recourse to materials and texts which were not collected in a research context. Overall, it remains important to consider the issues of the context of the assessment process and the time since travel when conducting any kind of appraisal of quality-of-life studies exploring holiday taking.

A further consideration of the quality-of-life benefits associated with travel, holiday relationships and the learning associated with those experiences revolves around the subjective versus objective dimension. Most assessments focus on the individual's own view of their quality-of-life. This seems, superficially, to be realistic since it is consistent with good research practices about gaining an emic view of the activities and travel experienced. There may be some opportunities, however, to assess other people's views of how travellers have changed. Do friends and families think an individual they know well is happier, more tolerant and more content after a set of holiday experiences? Are they prepared to grant that the individual has a greater sense of maturity or has become more spiritual? It seems at least worth exploring the links between these internal and external views.

Conclusion

The material reviewed in this chapter has confirmed the centrality of relationships for many kinds of tourists. Tourism settings provide a number of distinctive occasions and opportunities for individuals to initiate, develop and test relationships. The quality-of-life implications which stem from these dynamic processes include reducing stress, fostering identity, adding to skills and character strengths and building an emotional preparedness to be receptive to others.

Challenges and opportunities clearly co-exist in furthering research on tourism relationships and quality-of-life. Some of these opportunities lie in suggesting future work which more closely investigates the dynamics of relationship development and the associated rewards and constraints. The kinds of travel parties which might be explored are somewhat different than the market segments normally suggested in demographic and psychographic profiles. The emphases in quality-of-life and relationship studies could include close attention to family travel, travel with friends, travellers developing intimate relationships, travel with one's children and travelling with others with special needs such as the disabled and the elderly. The focus of this work would be on how people view the successes and challenges of their holiday experiences for their overall well-being. The methods to initiate and develop this kind of work have been outlined in reviewing extended approaches to assessing quality-of-life concerns and embrace not just survey work but an array of approaches built on memory work, examining blogs and exploring multi-person and

multi-perspective views of the outcomes of travel. One of the rewards of pursuing this kind of work may be a richer and more integrated role for tourism studies in the pantheon of academic life. That alone might be a quality-of-life benefit, not just for the tourists who are being studied but also for the researchers who study them.

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Chapter 3

Positive Psychology and Tourism

Sebastian Filep

Quality-of-Life and Positive Psychology

While quality-of-life can be understood from philosophical, sociological, marketing management and other standpoints, all of which are applicable to tourism (Sirgy et al. 2006), research from psychology could embellish current understandings of tourism and quality-of-life. This chapter describes the rise of the field of positive psychology, a study of well-being in psychology (Seligman and Csikszentmihalyi 2000), and highlights its linkages and value to tourism.

To understand the relationship between positive psychology and tourism as part of this volume on quality-of-life, it is appropriate to first consider how positive psychology relates to the concept of quality-of-life. Sociologist and social psychologist Ruut Veenhoven has dedicated his long research career to understanding quality-of-life issues (Veenhoven 2010). The first question Veenhoven suggests we ask is: Quality of what life is being investigated? The object of evaluation is life, and this could be an individual life (the quality-of-life of a tourist) or quality-of-life (QOL) on an aggregate level (the quality-of-life of groups of tourists). QOL does also not always refer to human life. It is used for animals, for example, in discussions about conditions of cattle slaughter (Veenhoven 2000). If, however, the focus is on understanding the quality of individual human lives, the goal should be to explore what specific qualities are implied by the term quality.

Veenhoven's (2000) conceptualisation of the quality-of-life is summarised in Table 3.1.

Veenhoven refers to multiple human life qualities which can be ordered on the basis of two distinctions. The first distinction is between opportunities and the outcomes of life. He explains: '...a relevant distinction is between opportunities for a good life and the good life itself. This is the difference between potentiality and actuality. I refer to this as life chances and life results' (2000, p. 4). The second distinction he makes in defining quality-of-life is between outer and inner qualities of life. The outer quality relates to the environment and the inner to the individual. This distinction between inner and outer is also made by Lane (1994) and Musschenga (1994). Lane differentiates between the quality of society and quality of a person. Similarly, Musschenga argues that the quality of the conditions for living is not the same as the quality of being human.

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Table 3.1 Four qualities of life

	Outer qualities	Inner qualities
Life chances	Liveability of environment	Life-ability of the person
Life results	Utility of life	Appreciation of life

Source: Veenhoven (2000)

Liveability of the environment refers to the meaning of good living conditions. An aligned term is habitability, albeit it is more frequently used to describe the quality of housing (Veenhoven 1996). Life-ability of the person is also a life chance, although it is an inner quality. It refers to how well an individual is equipped to cope with the problems of life. A related concept is the one of capability (Sen 1992).

The life results however are about the quality-of-life with respect to its outcomes. The outcomes can be judged by their value for one’s self (appreciation of life) or by their value to one’s environment (utility of life). Appreciation of life is therefore commonly linked to subjective well-being and life satisfaction: ‘Life has more of this quality, the more and the longer it is enjoyed’ (Veenhoven 2000, p. 7). Utility of life on the other hand means that a good life must be good for something more than itself (Gerson 1976). This external quality does not require inner awareness. So, a person’s life may be useful from some viewpoints, without her or him knowing it.

Therefore, while difficult to clearly define, the term quality-of-life is a catchword for various notions of the good life. It is appropriate to be aware of these nuances in the context of understanding tourists’ quality-of-life. It is the inner qualities that Veenhoven links with psychological terms and concepts such as autonomy, reality control, creativity, inner synergy of traits, life satisfaction, happiness and subjective well-being. These terms and concepts are important topics of research in the field of psychology that deals with the topics of the good life – positive psychology.

So, positive psychology neatly relates to the conceptualisation of quality-of-life by Veenhoven. Now that this linkage has been established, a close look at the development of positive psychology follows. The forthcoming discussion introduces the tourism reader to the body of knowledge which has value to tourism, but which is still underexplored in the tourism literature. It is recognised that the inclusion of a detailed review of literature from psychology is unorthodox for a tourism chapter. The forthcoming review however is necessary to present the positive psychology research field to the tourism reader.

Development of Positive Psychology

Past

Positive psychology has many prominent ancestors and some contemporary cousins. There are philosophical roots of the field in the teachings of Socrates, Plato, Aristotle and other thinkers about the good life. Later on, mostly during the nineteenth and twentieth centuries, psychological traditions in psychoanalysis, behaviourism, humanistic psychology, cognitive therapy and existential psychology contributed to current understanding of the positive dimensions of human existence (Duckworth et al. 2005). Some notable works are those of Freud (1933) on the pleasure principle, Jung’s (1955) ideas on spiritual and personal wholeness, Frankl’s (1984) work on finding meaning under dire human conditions or Adler’s discussions of healthy individual strivings motivated by social interest (1927).

Perhaps most notable of these traditions is humanistic psychology and the academic humanist movement (Resnick et al. 2001). Rogers, Maslow, Murray, Allport and May or the so-called fathers of humanistic psychology (Duckworth et al. 2005) have dealt with the questions of the good life, individual growth and achievements, authenticity and personal responsibility building (Sheldon and Kasser 2001). Of central interest is Maslow's work on self actualisation, which is a state in which people have access to the full range of their talents and strengths. Maslow (1954) also used the term positive in his seminal chapter entitled 'Toward a Positive Psychology' in his *Motivation and Personality* book. Continuing in the humanistic tradition, Jahoda (1958) made the case for studying psychological well-being in its own right and not as an absence of disease and distress. Duckworth et al. claim: '....Jahoda provided a framework for understanding the components of mental health (rather than mental illness)' (2005, p. 633). Jahoda (1958) identified six processes that contribute to mental health: growth/development/becoming, integration of personality, autonomy, accurate perception of reality, environmental mastery and acceptance of oneself.

In terms of the more contemporary cousins, related works are those on self-efficacy by Bandura (1989), broader conceptions of intelligence by Gardner (1983) and Sternberg (1985), studies of giftedness, genius and talent by Winner (2000) or quality-of-life studies of psychiatric patients (Levitt et al. 1990). Nevertheless, Gable and Haidt (2005) point out that before the year 2000, the start of the positive psychology era (Seligman and Csikszentmihalyi 2000), most studies in this discipline dealt with depression, racism, violence, trauma, suicide, irrationality and growing up under adversity. Much less was known about character strengths, virtues, civic engagement and conditions leading to happiness. Gable and Haidt point to a comment on the situation in psychology before the new millennium: 'In one metaphor, psychology was said to be learning how to bring people up from negative eight to zero but not as good at understanding how people rise from zero to positive eight' (Gable and Haidt 2005, p. 103).

Current Developments

The imbalance in psychology has been slowly readjusting over the last decade. In the 2005 issue of the *American Psychologist*, Seligman, Steen, Park and Peterson provided a detailed review of positive psychology progress. They report that, since the seminal introduction of positive psychology (Seligman and Csikszentmihalyi 2000), literally hundreds of articles have appeared in the scholarly and popular press on the topic. Related books have also begun to appear: *The Handbook of Positive Psychology* (Snyder and Lopez 2002), *A Psychology of Human Strengths* (Aspinwall and Staudinger 2003), *Authentic Happiness* (Seligman 2002), *Flourishing* (Keyes and Haidt 2003), *Positive Psychological Assessment: A Handbook of Models and Measures* (Lopez and Snyder 2004), *Positive Psychology in Practice* (Linley and Joseph 2004), *Character Strengths and Virtues: A Handbook and Classification* (Peterson and Seligman 2004) and others. More recent books can be added to the literature repertoire after Seligman et al.'s (2005) review. Some of these are: *A Life Worth Living: Contributions to Positive Psychology* (Csikszentmihalyi and Csikszentmihalyi 2006), *Handbook of Methods in Positive Psychology* (Ong and van Dulmen 2007), *A Primer in Positive Psychology* (Peterson 2006), *Positive Psychology Coaching* (Biswas-Diener and Dean 2007), *The How of Happiness* (Lyubomirsky 2007), *Happier* (Ben-Shahar 2007), *Happiness: Unlocking the Mysteries of Psychological Wealth* (Diener and Biswas-Diener 2008) and the *Oxford Handbook of Positive Psychology and Work* (Linley et al. 2009), and the recently released *Flourish* (Seligman 2011).

Meetings, centres and courses on positive psychology are flourishing. Well-attended scholarly meetings and conferences regularly occur. In October 2004, over 390 psychologists from

23 countries attended the Third Annual International Positive Psychology Summit (Seligman et al. 2005). In 2007, a major positive psychology in business conference in London attracted much attention from academics, industry leaders and the general public (University of East London 2007). In 2009, a Happiness and Its Causes conference was sold out and held in May in Sydney, Australia (Happiness and Its Causes 2009). An aligned event was held in Singapore in November 2008. The first World Congress on Positive Psychology was held in June 2009 in Philadelphia, USA and the second in July 2011. The first Australian positive psychology conference was held in 2008, complementing a series of successful academic events in Asia, Europe and New Zealand (International Positive Psychology Association 2008; Australian Positive Psychology Association 2008; The New Zealand Association of Positive Psychology 2008; Positive Psychology Centre in Asia 2010). Two main academic journals have developed (ENPP 2010): the Journal of Happiness Studies and the Journal of Positive Psychology (which from 2009 has increased to six issues per year).

Research centres and university courses are also developing. Seligman et al. (2005) reported that the Positive Psychology Network funds more than 50 research groups involving more than 150 scientists from universities all over the world. This figure may be significantly higher for 2010 and 2011. In 2005, 2006 and 2007, dozens of scientists and scholars gathered to discuss work on five major projects: (1) productivity and health as a function of happiness, (2) national well-being indices, (3) spirituality and successful aging, (4) psychological capital and (5) positive psychology websites in Mandarin and Spanish and ultimately for all major language groups. English language websites in positive psychology are already burgeoning, together with a positive psychology list-serv. The work of the scientists in these areas is steadily progressing. In terms of the university courses, the first Master's degree on positive psychology started in September 2005 at the University of Pennsylvania. Within one month of announcing the existence of the degree, over 200 applications were filled. Today, this university is only one of many offering similar postgraduate courses. Positive psychology was the most popular undergraduate subject at Harvard University in 2006 (The Boston Globe 2006). There is also a teaching task force at the Positive Psychology Centre (2010) working on disseminating positive psychology curricula in high schools and colleges.

Due to such popularity, research funders have been generous and have made substantial grants to support scholarly research and the dissemination of the findings. Some major funding organisations have included: Atlantic Philanthropies, the Annenberg Foundation, Sunnylands Trust, the Mayerson Foundation, the Templeton Foundation, the Hovey Foundation, the Gallup Foundation and various national government departments (Seligman et al. 2005; Positive Psychology Centre, 2010).

Christopher and Hickinbottom's (2008) review however shows that two dominant views of conceptualising the good life have emerged in positive psychology: the subjective well-being theory and the authentic happiness theory view. A review of these two dominant theories precedes a discussion of the linkages between tourism and positive psychology as the theories have relevance to tourism research. So, in addition to the above overview of positive psychology, the analysis of subjective well-being and authentic happiness is part of an overall introduction of the field to the tourism reader.

Subjective Well-Being (SWB)

The first key theory is the subjective well-being theory. Due to an overriding concern with distress and disorder (Seligman and Csikszentmihalyi 2000) in much of psychology, SWB did not start developing until the merge of humanism as an alternative approach to explaining human behaviour in the middle of the twentieth century (Wilson 1967; Bradburn 1969). From the

1970s, the research on SWB further developed, but it was not until the positive psychology emergence that the research on SWB really started flourishing (Kahneman 1999; Kahneman et al. 1999; Seligman and Csikszentmihalyi 2000). Definitions of SWB have started appearing in the literature. Diener, Suh, Lucas and Smith offer the following: ‘Subjective wellbeing is a broad category of phenomena that includes people’s emotional responses, domain satisfactions and global judgments of life satisfaction’ (1999, p. 277).

Measures of SWB have significantly improved over the last four decades (Sirgy et al. 2006). Early measures tended to be brief, in some cases consisting of a single item within a larger questionnaire. This generic approach is problematic as the facets of SWB are separable and often account for unique variance in the measurement of the overall construct (Sirgy et al. 2006). In view of the above concerns, most contemporary SWB measures are multiple-item quantitative instruments, typically with sub-scales to measure separate facets of SWB.

The measures of SWB have typically been based on two dominant theoretical approaches: the top-down and the bottom-up approaches (Diener 1984). Top-down approaches are focused on mechanisms by which factors within persons (namely personality traits) determine how a person perceives her or his life circumstances and the events they experience in positive or negative terms. On the contrary, bottom-up approaches assume that humans all have basic needs, and if life circumstances allow for the fulfilment of these needs, SWB will be achieved (Diener et al. 1999; Stallings et al. 1997). Together with these two approaches, more focused perspectives have been developed on SWB, such as the theories focusing on goal setting (Diener et al. 1999) and the concept of coping (Lazarus and Folkman 1984).

Despite the theoretical and measurement developments, Sirgy et al.’s (2006) review points to several major issues that need to be addressed if research on SWB is to develop further. The first issue is to improve the quality of research. Diener and Seligman (2004) point out that a large number of SWB studies continue to be conducted in a rudimentary and unsystematic fashion. Many focus on only one aspect of SWB, such as life satisfaction, and do not assess other factors such as people’s emotional responses. The other issue is a tendency to conduct cross-sectional and correlational studies instead of longitudinal studies and the subsequent inability of most of SWB data to explain underlying causal mechanisms. Systematic longitudinal designs (Marks and Fleming 1999) could begin to reveal developmental trends in SWB and allow for an investigation of the effects of life experiences (such as marriage, changes in employment) on individuals’ overall levels of SWB. Lastly, there is a need to further apply the findings from research on SWB. Various pragmatic applications of the results on SWB have been found (Linley and Joseph 2004), but the implementation of these interventions has been minimal.

Authentic Happiness

Within positive psychology, however, the good life is also conceptualised according to Seligman’s (2002) authentic happiness theory of the pleasant life, the good life and the meaningful life. Despite the recent extension of the theory (Seligman 2011), the three elements remain crucial to understanding personal well-being from Seligman’s perspective. The pleasant life maximises pleasurable and positive experiences. It includes positive emotions about the past, present and future. Frederickson (2001) has identified four core positive human emotions: love, interest, joy and contentment. The good life results when people develop their virtues and strengths in activities that they are passionate about. This second domain consists of using positive individual traits, including strengths of character and talents, and is commonly linked to the notion of engagement. The character strengths are qualities which are considered virtuous across cultures and historical eras (e.g. valour, leadership, kindness, integrity, originality, wisdom) (Seligman

2002). The meaningful life results when individuals apply their strengths in activities that contribute to the greater good, such as parenting, developing friendships or servicing the community. It is argued that positive traits and positive emotions best develop through positive institutions. As meaning derives from belonging to and serving something larger than oneself, a life led in the service of positive institutions is hence the meaningful life (Duckworth et al. 2005).

Under the broad umbrellas of the authentic happiness and SWB, clusters of research have formed in positive psychology. These research clusters investigate the following topics: resilience, flow, positive emotions, self esteem, emotional intelligence, emotional spirituality, creativity, personal control, mindfulness, optimism, hope, self-efficacy, problem solving, goal setting, wisdom, pursuit of meaningfulness in life, humour, mediation, spirituality, positive organisational scholarship, positive ethics, authenticity, humility, closeness, compassion, forgiveness, gratitude, love, empathy and altruism and moral motivation (Snyder and Lopez 2002). It is close to impossible to try to comprehensively relate all these topics to tourism in a single handbook chapter. The following section however highlights linkages to tourism of some of the topics from Snyder and Lopez's extensive list.

Linkages to Tourism

A growing but a very small group of tourism researchers has started drawing linkages between tourism studies and positive psychology. This group is predominantly from Australia (Filep 2007, 2008, 2009; Pearce 2009a, b; Voigt 2010) and the Netherlands (Van Boven and Ashworth 2007; Nawijn 2009; Nawijn et al. 2010) although there is also research interest in other countries – for example, the United States (Mitas 2010). The idea for specifically linking the two fields was proposed recently (Filep 2007), although the application of related theories from humanistic psychology to tourism has a much longer tradition (Pearce 1982; Ross 1994).

Pearce et al. (2011) explore specific linkages between positive psychology and tourism. While there are other tourism researchers who sometimes deal with the topics of positive psychology (such as resilience, flow, positive emotions, mindfulness, well-being), they typically do not refer to the positive psychology body of knowledge. An example is the much cited Gilbert and Abdullah's (2004) tourism work on well-being that approaches the topic of well-being from a different body of knowledge. Discussions in the following sections expand on the incipient linkages made by Pearce et al. (2011). While there is some overlap with the ideas presented in their volume, effort is made to differentiate this analysis. Some topics that are addressed by Pearce et al. are excluded from this section to avoid duplication – for example, the discussion of positive psychology motivation models, discussions of wisdom in tourism and host community reactions to tourism development.

Broadly speaking, the positive psychology and tourism linkages can be divided into investigations of tourists and their experiences, analyses of values, such as tourism education values, and research on human resource issues in tourism, such as the role of humour. So, there are important potential applications of positive psychology to tourists, tourism educators, students and tourism workers in addition to applications to communities which have been addressed by Pearce et al. (2011). While recognising that recent and ongoing research projects may be missed, the following discussion provides some examples of the linkages from each of the three categories.

Tourist Experiences, Happiness and Positive Psychology

Linkages between positive psychology and the tourist experience have been made through analyses of happiness of tourists (Filep 2009; Nawijn 2009; Nawijn et al. 2010) as well as through

investigations of specific tourist behaviour concepts, such as motivation (Pearce et al. 2011), on-site and reflective experiences and satisfaction (Filep 2007) and health outcomes of holidays (Voigt 2010). The discussion here focuses on understanding tourist happiness.

There are currently two core research directions for understanding tourist happiness: tourist happiness based on the subjective well-being view of the good life (Veenhoven 2004) and the exploration of tourist happiness based on the authentic happiness view. In lay terms, the first view conceptualises tourist happiness mainly in terms of feeling good, and the second view conceptualises tourist happiness in terms of feeling good and deriving meaning from life (Seligman 2002; Wu 2010).

The subjective well-being linkage has been made in studies of international tourists in the Netherlands (Nawijn 2009) and of Dutch tourists and non-vacationers (Nawijn et al. 2010). The first study investigated how well tourists felt during a holiday. Close to 500 tourists answered questions about their mood and satisfaction with life. Conclusion was that holiday trips were enjoyable for most tourists regardless of their socioeconomic status, hence dispelling the myth of a holiday misery. However, the study also found that tourists' mood varies during a trip and that tourists feel the best during their perceived core phase of the travel experience and at the very end of a holiday (Nawijn 2009).

Continuing on in the subjective well-being tradition, the study by Nawijn et al. (2010) attempted to obtain a better insight into the association between happiness and vacation (where happiness is again interpreted in affective terms, as a positive feeling). Two core issues were examined: if a holiday trip boosts post-trip happiness and if tourists differ in happiness compared to people who do not go on holidays. Through a large quantitative study of Dutch individuals, it was found that vacationers were happier compared to non-vacationers and that only a very relaxed holiday boosts vacationers' happiness further after return. There is a pre-trip happiness difference between the two groups – vacationers reported a higher degree of happiness, and it was suggested that this could be because they are anticipating their holiday.

A different approach to understanding tourist happiness, however, was employed by Filep (2008, 2009) and most recently Kler and Tribe (in press) Filep and Deery (2010). Happiness here was conceived according to the authentic happiness theory of positive emotions, meaning and engagement. In these analyses, it was found that reflections on holidays can be quite meaningful and transformational and would contribute to tourist happiness if happiness is conceived as more than feeling good. In Filep's (2009) PhD project, qualitative results point to quite powerful tourist memories. In this study, an in-depth analysis was conducted of the tourist experience of Australian study-abroad university students. The students were undertaking a study-abroad trip in Spain. The study assessed travel motivation and travel satisfaction of the group in three phases of their travel experience (anticipatory, on-site and reflective phases). Travel motivation themes were identified in the anticipatory phase; immediate and post hoc satisfaction themes were identified in the on-site and reflective phases of the tourist experience. The students' motivation and satisfaction themes were identified through qualitative positive psychology approaches. An exploratory picture of a happy tourist has emerged from this psychological investigation. In this picture, the three dimensions of happiness from the authentic happiness theory – meaning, engagement and positive emotions – were linked to the students' travel motivation and satisfaction themes in their three travel phases. An important finding of relevance to this discussion is that the tourists' reflections on their holidays created powerful meanings to them after their return. One participant in the study noted: 'I realised there is more to this world than the materialism we at times bind ourselves to in our daily life'. Another tourist said: 'I came to know Spain better than I ever had before'; there are many more examples of such quotes from the tourists' stories. Similar findings that holiday experiences can produce seemingly transformational meanings have been found in studies of backpackers (Noy 2004; Obenour et al. 2006). In a study of backpackers' travel narratives, a profound self-change is recounted (Noy 2004). The backpackers in Noy's study are portrayed as narrators, whose stories strongly feature themes of authenticity and adventure as part of the powerful experience of self-change.

So it appears that both the authentic happiness view and the subjective well-being view have relevance in conceiving happiness of tourists. It is largely a matter of choice which happiness theory is employed to analyse this important quality of the tourist experience. It may be that in some cases, such as longer study-abroad trips or backpacking trips, the meaning element becomes more relevant to tourists, so investigations that assess happiness through this lens may be more appropriate. In other cases, with shorter trips, the SWB evaluations or similar affective evaluations may be sufficient. It is significant to note however that positive psychology theories improve current understandings of this important outcome of travel, irrespective of which happiness theory is employed. There is evidence from both perspectives that holidays make people happy.

Tourism Education, Values and Positive Psychology

The next key linkage between positive psychology and tourism exists in the context of education. An example of this linkage is the insight of values from positive psychology to the recently formed global tourism education values – the values of the Tourism Education Futures Initiative (TEFI) (Sheldon 2008). In 2006, a need was identified for significant changes in the content of tourism education programs. This need led to a formation of Tourism Education Futures Initiative (TEFI) (Sheldon 2008). The vision of TEFI is to provide knowledge and framework for tourism education programs and promote global citizenship and optimism for a better world. Following two TEFI Summits, a set of values were identified as key to this vision. These values are:

1. Stewardship: sustainability, responsibility and service to the community
2. Knowledge: critical thinking, innovation, creativity, networking
3. Professionalism: leadership, practicality, services, relevance, timeliness, reflexivity, teamwork and partnerships
4. Ethics: honesty, transparency, authenticity, authentic self
5. Mutual respect: diversity, inclusion, equity, humility, collaboration

The values would influence global tourism curriculum at a university level. Positive psychology offers the potential to advance the TEFI set. Positive psychology literature frequently covers many of the themes represented by the TEFI values. Seligman (2002) writes about authenticity and the authentic self in the context of happiness, and authenticity is a component of the TEFI's ethics value. In the seminal introductory paper to positive psychology (Seligman and Csikszentmihalyi 2000), the values of humility and equity are mentioned among others. Humility and equity are TEFI's mutual respect components. More explicitly, however, positive psychology work on character strengths by Peterson and Seligman (2004) has the potential to embellish the TEFI value set. Peterson and Seligman's (2004) strengths of character (individual qualities that have been shown as applicable to different cultures) are presented in Table 3.2 alongside the TEFI values. Table 3.2 is adapted from Table 8.2 of the Pearce et al. (2011) text. Unlike the table in that text, definitions of the character strengths are presented to highlight the connections to the TEFI set.

Connections to the TEFI set are apparent after carefully considering the definitions of the character strengths. Being aware of the needs of others and displaying a humane service to the community are an important aspect of the TEFI's stewardship value (Sheldon 2008), and it can be seen that the character strength of humanity is similarly defined as an interpersonal strength that includes tending and befriending others (Peterson and Seligman 2004). Similarly, the character strength of courage resembles the TEFI's knowledge, professionalism and ethics values. Bravery, persistence, authenticity and zest are some of the qualities that a person with courage would possess (Peterson and Seligman 2004). TEFI's knowledge and professionalism

Table 3.2 Positive psychology strengths and TEFI values

Character strength	Character strength definition	TEFI value
Temperance	Strengths that protect against excess	Ethics
Wisdom and knowledge	Cognitive strengths that entail the acquisition and use of knowledge	Knowledge
Humanity	Interpersonal strengths that involve ‘tending and befriending’ others	Stewardship
Transcendence	Strengths that forge connections to the larger universe and provide meaning	Professionalism
Justice	Civic strengths that underlie healthy community life	Mutual respect
Courage	Emotional strengths that involve the exercise of will to accomplish goals in the face of opposition, external or internal	–

Source: Adapted from Pearce et al. (2011)

are about critical thinking, innovation and leadership resembling the qualities of courage. Furthermore, an exercise of the TEFI’s stewardship value by students and how they respond to the challenges of humanity as expressed, for example, in the Millennium Development Goals, potentially require the character strength of courage (Pearce et al. 2011).

So, while the connections here have not been tested empirically, the potential of positive psychology to add to current conceptualisation of values in tourism education is apparent. Future research could examine the suggested linkages between the TEFI values set on one hand and the positive psychology contribution to the values on the other. Additionally, their context within broader frameworks such as the abovementioned theories of happiness may be worth investigating.

Tourism Human Resources, Humour and Positive Psychology

A third incipient linkage exists between human resource issues in tourism and positive psychology. Human resource issues are those issues that relate to working conditions and employment (Baum 2007). Perhaps the most powerful aspect of this linkage is the value of humour to human resources in tourism. Humour is an important positive psychology research topic (Snyder and Lopez 2002) yet one that is underexplored in the tourism literature (Wall 2000; Pearce 2009b; Walsh 2010).

A few tourism authors have however considered the topic of humour. Walsh (2010) highlights the positive role that humour can play in customer service situations. Similarly, Ball and Johnson (2000) emphasise the role of humour in tourism and hospitality situations between staff and customers. They explain that humour can provide a positive experience for the customer and attract sales. In his analysis, Pearce (2009b) also notes that there has been a surge of studies on humour in the workplace (Langlotz 2008) and aligns this surge to emerging interest in performative labour and emotional intelligence (Bryman 2004).

Less work appears to be done on the use of humour among tourism staff than on customer service situations. A recent and thorough review of human resources in tourism (Baum 2007) has revealed that tourism workers’ quality of work life is generally low at a global scale and compared to other professions. Baum notes: ‘...In many respects, Wood’s bleak (1997) assessment of the industry remains substantially unchanged in many countries, both developed and less developed’ (2007, p.1396). So it appears that there is room for humour to maintain staff morale and motivation in this poorly paid, competitive industry with high staff turnover (Baum 2007). A case in point is the philosophy of Richard Branson’s Virgin brand taken on by Virgin Blue airline

Table 3.3 Examples of statements from the Humour Styles Questionnaire

Humour type	Examples of statements
Affiliative humour	‘I laugh and joke a lot with my closest friends’. ‘I don’t have to work very hard at making other people laugh – I seem to be a naturally humorous person’.
Self-enhancing humour	‘If I’m feeling depressed I can usually cheer myself up with humour’. ‘Even when I’m by myself, I’m often amused by the absurdities of life’.
Aggressive humour	‘If someone makes a mistake, I will often tease them about it’. ‘When telling jokes or saying funny things, I am usually not very concerned about how other people are taking it’.
Self-defeating humour	‘I let people laugh at me or make fun at my expense more than I should’. ‘I will often get carried away in putting myself down if it makes my friends laugh’.

Source: Martin et al. (2003)

company (Branson 2006). Branson highlights the value of having fun at work and the use of humour to build loyalty to the organisation and motivate staff as part of the overall airline company’s philosophy.

Not all types of humour however are beneficial and conducive to motivating staff. There is an aggressive type of humour (used to enhance the self at the expense of others) and self-defeating type (used to enhance the relationships at the expenses of self). On the other hand, there are more positive types such as self-enhancing type (used to enhance the self) and affiliative type of humour (to improve one’s relationship with others) (Kazarian and Martin 2004; Martin 2007).

Positive psychology literature can provide a tourism researcher with measurement instruments that can be used to assess how different types of humour affect the tourism workplace (Martin 2001). An example of one such instrument is the Humour Styles Questionnaire, developed by Martin et al. (2003). This questionnaire measures individual differences in humour. It is the first self-report measure to assess ways in which people use humour that are less desirable and potentially detrimental to psychological well-being (aggressive and self-defeating humour) as well as the more beneficial types. While the questionnaire in Martin et al.’s study was employed with a group of university students, the scale could be adapted to workplace settings. In this research, participants were asked to indicate their level of agreement with statements that correspond with each humour type, from 1 (totally disagree) to 7 (totally agree). Examples of the statements from the study are shown in Table 3.3.

Tourism managers could employ the self-administered questionnaire with their staff and identify which staff use the type of humour that is detrimental to workplace relationships and which staff contribute to the overall positive and motivating atmosphere at the workplace, which is ultimately linked to productivity. Humour and the above topics are clearly underexplored yet relevant to tourism; the tourism-positive psychology linkages are hence worth further developing beyond these incipient relationships.

Future Challenges

Despite its past progress, current rise and apparent relevance to tourism, positive psychology faces a number of conceptual and methodological challenges for future research development. Analogous challenges exist in the tourism research field. The positive psychology movement has been criticised by a number of scholars (Bacigalupe 2001; Shapiro 2001; Walsh 2001; Held 2004; Gable and Haidt 2005; Christopher and Hickinbottom 2008). A review of this literature

shows that to reach its goal of mapping out the domain of optimal human functioning in a holistic manner, positive psychology must conquer two core challenges: (1) overcome insularity and (2) connect with health. The challenges are discussed below, and as they apply to both fields, they present opportunities for further development of both positive psychology and tourism research.

Overcoming Insularity

The first challenge can be termed overcoming insularity. This means that there is a need to further correct with related fields and specialisms, to further embrace non-Western perspectives in research and thirdly to embrace a greater plethora of methodological styles in research. Justification for these views is presented in the forthcoming discussions.

Reaching Out

The first major challenge is the need to eliminate the image of positive psychology as a cult like research specialism (Held 2004). There is a need to fulfil the full vision of Seligman and Csikszentmihalyi (2000) to achieve a balanced, empirically grounded and theoretically rich view of human experiences that fulfils the mission of psychology as the science of mental life. Gable and Haidt state: ‘the recent movement on positive psychology strives toward an understanding of the complete human condition, an understanding that recognizes human strengths as clearly as it does human frailties and that specifies how the two are linked’ (2005, p. 109). Some authors argue that positive psychology will succeed if the findings of positive psychologists become part of mainstream psychology and the movement disappears as a separate niche within this discipline (Linley et al. 2006). Recent emergence and growth of positive education, positive health and economics of well being (Seligman 2011) are examples of positive psychology reaching out to other fields but similar initiatives need to be continued.

Analogous calls for reaching out have been made in the tourism field (Jafari 2005; Ateljevic et al. 2007; Tribe 2009). A few years back, Jafari (2005), in his opinion piece, made a call for externalising knowledge: keeping tourism a multidisciplinary field, publishing in outside journals, lodging social science courses in tourism curricula, encouraging outside PhD students to investigate tourism themes and so on. Similar suggestions have been made by Tribe (2009). Tribe implies that tourism should move away from academic divisions and insular thinking and connect to greater ideals and other disciplines. So, analogous discussions of insularity, specifically the need to connect to other fields, are currently happening in both tourism and positive psychology.

Embracing Non-Western Perspectives

The second insularity challenge is the challenge of embracing cross-cultural perspectives. Earlier critics argued that positive psychology is too Western-centric, even racist in its alleged non-representation of people of colour. Commenting on Seligman and Csikszentmihalyi’s (2000) seminal introduction, Bacigalupe asked: ‘Where in this issue were the writers who speak about the histories, courage, challenges and success of people of colour?...little was offered towards deconstructing how, in hosting such a relevant theme, the major journal in the field simply kept the perspective of psychologists of colour silenced and invisible’ (2001, p. 83). Walsh (2001) emphasised that the seminal paper omitted insights from non-Western psychologies and therapies, such as the Indian psychologies of Buddhism and yoga. These criticisms, however, are losing

strength as positive psychology marches towards the future. Due to such large expansion of this field there is now a significantly richer plethora of cross-cultural and racially mixed perspectives and insights in this field than in the year 2000 (Positive Psychology Centre in Asia 2010).

Nevertheless, there are opportunities to reconsider cross-cultural applicability of key positive psychology theories. The meaning – engagement – positive emotions conceptualisation of happiness has been criticised by some scholars (Christopher and Hickinbottom 2008). They question its applicability to non-Western cultures. For the Balinese, there are two equally valid realms of meaning – *sekala*, the ordinary realm of daily life (one that is visible to most tourists), and *niskala*, the spiritual world and a deeper level of reality (Pearce et al. 2011). The subjective well-being theory has also been criticised. Life satisfaction scales (typical subjective well-being measurements) assess satisfaction with life in highly individual terms. Some non-Western cultures view satisfaction with individual life as interconnected with the satisfaction with life of others. Christopher and Hickinbottom (2008) refer to Miller's (2004) remarks that Hindu Indians commonly do not experience individual satisfaction as antithetical to duty. Instead, many Hindu Indians 'not only consider it more desirable to respond to the needs of family members in situations involving high cost, but also indicate that they would experience such behaviour as more satisfying' (Miller 2004, p. 127). Similar observations have been made by Ryan et al. (2009) who call for a re-evaluation of culturally biased yet taken for granted assumptions in tourism.

Improving Research Methods

The last aspect of the insularity challenge is methodological. Critical tourism research community has flourished in the last few years (Ateljevic et al. 2007; Tribe 2008) and has presented an argument that positivist research ideologies and subsequent quantitative measures are biasing knowledge production in the tourism field. While not all tourism researchers may agree with this statement, it is interesting to note that similar discussions are happening in the positive psychology research community. The case for reconsidering research methods is strengthened by this observation.

Ryff (2003) argues that the future task of positive psychology is to thoroughly understand the factors that build strengths, outline the context of resilience, delineate the functions of positive relationships and understand the role of positive experiences from diverse perspectives. There is a need to understand how all of those factors contribute to physical health and flourishing institutions (Gable and Haidt 2005). Clearly, such a complex investigation calls for methodological improvements and diversity. A full spectrum of methods available to psychologists can be utilised in this type of research. It appears that Shapiro's (2001) argument that positive psychology ignores some relevant qualitative empirical research may still hold true. A review of the literature shows that the research in positive psychology has been dominated by a strict positivist tradition of measuring complex phenomena such as happiness and well-being with a set of scales. Exceptions to this rule are very few – for example, in-depth interviews that assess the engaging state of flow (Csikszentmihalyi and Csikszentmihalyi 2006) or measures of meaning such as written narratives (Duckworth et al. 2005). By embracing a greater plethora of methodological approaches or by improving existing assessments, positive psychology will be able to better explain some components of its theories, such as the meaning component of the authentic happiness theory (Headey et al. 2010). As outlined in the previous section, perceptions of meaning may not be culturally uniform (Seligman 2002). So, cross-cultural evaluations of meaning could potentially be advanced through qualitative assessments that may capture multiple layers of meaning, as in the Balinese case. On the other hand, it is not suggested that quantitative methods are necessarily based on mindless and uncritical thinking with little consideration for cross-cultural perspectives – the view that is sometimes implied by some critical tourism scholars. Instead, a greater methodological plurality may be required in tourism and positive psychology.

This notion of methodological plurality fits the critical realist philosophy (Groff 2004). While acknowledging the roles of perception and cognition, critical realism maintains that a mind-independent reality could exist (Lopez and Potter 2001). The term was coined by American philosopher Roy Wood Sellars in an attempt to mediate between direct realism and idealism by saying that the objects of perception are neither objects themselves nor simply ideas (Drake et al. 1920). In a practical methodological sense, this philosophy argues that a particular problem can be studied and/or solved through positivist and relativist methods (Groff 2004), commonly through triangulation (Veal 2005). Groff argues that strict relativism as well as strict positivism are problematic. In strict relativism, as all beliefs about the world are equally valid, no claims can be challenged on cognitive or epistemic grounds. On the contrary, in strict positivism, the alleged truth is always obtainable. Flax (1992), however, points out that: ‘Part of the purpose of claiming truth seems to be to compel agreement with our claim. We are often seeking a change in behaviour or a win for our side. If so, there may be more effective ways to attain agreement or produce change than to argue about the truth’ (1992, p. 454). In other words, there seems little value in claiming that there is no absolute truth and that all truth is subjective. Just the same, there seems little value in claiming that an absolute truth exists. It may make more sense to combine these two opposing views in a hope of arriving closer to the more ‘objective’ truth.

It may be appropriate therefore to apply this critical realist philosophy to research methods in positive psychology and tourism. A scale that assesses sense of purpose and meaning in life has recently been developed, building on previous assessment approaches (Waterman et al. 2010). The scale is called the Questionnaire for Eudaimonic Well-being or QEWB. The questionnaire could be employed to investigate meanings in life of a group of participants. Qualitative assessments of meaning, such as autobiographical techniques or in-depth interviews (Duckworth et al. 2005), could supplement this quantitative assessment with the same sample. The findings could be triangulated in line with the critical realist approach. In the tourism field, prolific works from the critical realist perspective are studies conducted by Alison Gill, mainly in the area of community development and planning issues (Gill and Reed 1997; Gill 2000, 2004). There is however potential to expand the critical realist approaches to future research of positive psychology and tourism topics such as happiness, humour, values and other topics.

So, the challenge of overcoming insularity in positive psychology and tourism research is significant, but a consideration of this challenge produces many new ideas for future research. Clearly, all aspects of the insularity challenge – the need for methodological plurality and improvements, cross-cultural requirements and the need to connect to other fields – represent opportunities for future investigations in positive psychology and tourism.

Connecting with Health

Linked with the challenge of overcoming insularity is the positive psychology and tourism research challenge of connecting to health. It is considered a separate challenge for the purposes of this discussion due to an apparent importance of health in understanding optimal human functioning. Connections to health are current ambitions of both fields (Jafari 2005; Seligman 2008; Benckendorff et al. 2009), and at the moment, they are just that – ambitions. The problem is in integrating the predominantly subjective benefits of tourism and positive psychology with the more objective medical outcomes of health. The purpose of this section is not to offer answers to this problem. Instead, the section presents an overview of contemporary and relevant literature on health: research on optimism and its value to tourism workers, findings on health benefits

of holidays to tourists and resilience as a driver of host community health. The brief overview serves to highlight this important research challenge.

Tourism Workers and Optimism

Seligman (2008) has proposed an integration of positive psychology within the positive health field – the field that conceptualises health as more than mere absence of disease (Seligman 2008). He identified three kinds of independent variables as parts of positive health: subjective, biological and functional. These were related to worker issues by Pearce et al. (2011). Subjective variables refer to tourism workers feeling good and include standard positive psychology qualities (examples are optimism and life satisfaction and their measures); biological variables include more traditional and standard health indicators, such as blood pressure analysis, temperature and pulse rate, full blood count, urine analysis, liver function tests and similar health indicators. The last of the variables (the functional variables) relate to data on human movement (Seligman 2008): laboratory test data (such as physical capacity – flexibility, walk time, balance, etc.) and the data on individual's personal ecology (the optimal state of adaptation between bodily functions and physical requirements of one's lifetimes: work, love and play).

Correlations have been established between the subjective variable of optimism and biological outcomes, such as improvements in cardiovascular health (Kubzhansky and Thurston 2007). It was argued by Pearce et al. (2011) that by understanding the levels of optimism of tourism workers through subjective evaluations, we might be able to better understand the workers' biological health. The subjective evaluations include measures of optimism, such as the Optimism-Pessimism scale (Kubzansky et al. 2001). These findings could have implications for human resource decision making at larger tourism organisations, such as decisions on staff satisfaction and work stress issues. So, it is worth further exploring the tourism worker health issues through optimism.

Healthy Tourists and Resilient Communities

There are also opportunities for tourism and positive psychology researchers to deal with health issues that are not related to health concerns of tourism workers but instead to tourists and host communities. In her analysis of benefits sought and health-promoting behaviours of wellness tourists from a positive psychology perspective, Voigt (2010) developed a scale measuring benefits sought by wellness tourists. Exploratory factor analysis revealed six benefit factors: transcendence, physical health and appearance, escape and relaxation, important others and novelty, re-establishing self esteem and indulgence. Considering the factors, it is clear that improved physical health is an important benefit of wellness tourists (Smith and Pucskó 2008; Voigt 2010). Pearce et al. (2011) similarly refer to a study by Gump and Matthews (2000) which reported that compared with those who did not take vacations, the regular holiday takers were 31% less likely to die of cardiovascular disease. It is however unclear whether holidays are a direct cause of improved health or only a contributing factor. Similar concerns about the need to establish causality have been raised by Sirgy et al. (2006) in relation to SWB research.

The challenge of integrating the subjective benefits of tourism and positive psychology with physical health and hence explaining causality also exists in the context of host communities. Here the concept of resilience is particularly relevant to understanding health. Resilience can be defined as the capacity to recover from extremes of trauma and stress (Atkinson et al. 2009). Resilience is a concept that features in both positive psychology literature and tourism literature

(Atkinson et al. 2009; Strickland-Munro et al. 2010). There is now evidence that resilience is not a personality trait that is unmeasurable, fixed and stable over time (Reivich and Shatte 2003; Rutter 2007). Instead, resilience can be thought of as the process of struggle against hardship and can be learned at any age – it could be considered an acquired skill (Gillespie et al. 2007). The health benefits of resilience on individuals are numerous. There is compelling evidence, for example, that resilience plays a key role in recovering from a post-traumatic stress disorder (Paton 2006; Atkinson et al. 2009).

However, while many assessments of resilience (and optimism) show a correlation with health outcomes (e.g. Kubzansky et al. 2001), more studies should be done to ascertain if exactly optimism (as a core driver of resilience) causes health improvements of host community members and not some other factor. Further refinement of quantitative assessments and/or an integration with qualitative assessments is required, as has been suggested in the methodological discussion. Qualitative appraisals of resilience through interviews or focus groups may provide a more in-depth picture of host community health and resilience.

Despite the challenges of connecting with health and of overcoming insularity, there is a reason to be positive about the future of positive psychology and tourism research. The reason for this optimism is that basic tenets of both fields are in lay terms: fun, enjoyment and greater well-being, as opposed to pain and suffering. The congruence between these shared tenets is perhaps more relevant than academic labels which might change in the future. If Seligman's (2008) positive health agenda gains force, positive psychology may very well disappear as distinct label and instead be integrated within health research. Tourism is also increasingly intertwined with everyday leisure issues (Page 2010) and broad social concerns such as health (Smith and Pucskó 2008) and quality-of-life (Sirgy 2009). Under these non-insular conditions, it may be easier for positive psychology and tourism to continue to improve our understanding of well-being and related issues.

Conclusion

Despite such close congruence and similar challenges, the positive psychology and tourism research is still in its infancy. Table 3.4 summaries some key current linkages and the suggested future research directions by merging the concepts from different sections of this chapter into a single table.

Each column of the table is an independent list of topics, themes or names, and the connections along each row are loose. For instance, the table is not meant to imply that the future research direction of methodological plurality only applies to research on humour (a logical reasoning if each row of the table is analysed separately). More importantly, the table does not represent a full spectrum of potential applications of positive psychology to tourism nor does it claim to present a full list of international researchers in this field. Considering that the work in tourism and positive psychology is in its infancy and that some research projects are ongoing at the time of writing (Alexander 2010; Mitas 2010), it is not possible to craft a full picture of the potential applications at this stage. Despite its lack of comprehensiveness, Table 3.4 serves to highlight some important research agendas for the future while emphasising the linkages made in this chapter.

Perhaps the incipient linkages and the future directions presented here could serve as an invitation to tourism researchers to conduct future research in this growing field. Seligman (2008) reminds us that people desire well-being in its own right, above and beyond the relief of suffering. Positive psychology and tourism jointly contribute to fulfilling this basic human desire.

Table 3.4 Positive psychology and tourism: key concepts

Examples of research topics	Researchers	Examples of relevance to tourism	Future directions
Subjective well-being, positive emotions, engagement, meaning	Ross, Alexander, Witsel, Filep, Ratz, Michalko, Saunders, Kler, Matteucci, Nawijn	Conceptualisation and measurement of the tourist experience	Interconnections among tourism, positive psychology and other fields and disciplines
Critical appraisal of values in education, such as TEFI	Pearce, Filep, Ross	Conceptualisation and measurement of education values	Use of non-Western research samples and research techniques
Humour	Pearce, Pabel	Workplace motivation and empowerment; staff satisfaction appraisals	Methodological plurality; adoption of critical realism
Health, restoration, optimism and resilience	Voigt, de Bloom, Hagger, Panchal, Packer	Health benefits sought by wellness tourists; optimism of lifestyle entrepreneurs, host community resilience	Topics on physical and mental health

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Chapter 4

The Role of Qualitative Methods in Tourism QOL Research: A Critique and Future Agenda

Vincent P. Magnini, John B. Ford, and Michael S. LaTour

Introduction

As discussed throughout this handbook, tourism's impact on quality-of-life (QOL) is a topic laden with theoretical and practical relevance. An enhanced understanding of how tourism activities influence the QOL perceptions of travelers as well as the citizens residing in the host communities is pertinent and relevant to myriad constituencies. Thus, in attempts to cast further light on this topic, a number of researchers through the years have studied various facets of tourism QOL using qualitative methods.

Qualitative analysis can be described as “a process of examining and interpreting data in order to elicit meaning, gain understanding, and develop empirical knowledge” (Corbin and Strauss 2008, p. 1). From a practical perspective, qualitative methods can often offer researchers inexpensive and timely data that is often rich with meaning. This data can, in turn, be used for a variety of purposes. Broadly speaking, such uses may include the initial discovery of new ideas, thoughts, feelings or the critical examination of existing knowledge. Regardless of the application or setting, if used properly, qualitative research projects can offer insights and meanings not easily elicited through the use of quantitative techniques.

Therefore, the purpose of this chapter is twofold: (1) to provide a critical review of tourism QOL studies that have adopted qualitative approaches and (2) to identify opportunities by which the tourism QOL literature can be expanded through future qualitative inquiry. To achieve this purpose, the next section of this chapter provides a brief overview of the current state of tourism QOL theory development. Following this overview, the extant qualitative QOL studies are synthesized. Next, the chapter develops recommendations for future qualitative directions in the

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study of tourism QOL. In this section, specific emphasis is placed upon the potential of photo elicitation interviews, childhood memory elicitation procedures, and sentence completion tasks for advancing tourism QOL knowledge.

Tourism QOL Theory Development

From a macro-perspective, there exist three dominant paradigms by which to assess the “quality-of-life” (Brock 1993). The first enumerates facets of the good life that are driven by normative benchmarks founded upon religious, philosophical, or other systems. For instance, living within the moral guidelines of our religious values may spawn feelings of high QOL. The second model sometimes used to gauge QOL is founded upon the satisfaction of preferences (Brock 1993). According to this paradigm, it is posited that individuals use their limited resources to select those things that contribute most to their perceived QOL (Diener and Suh 1997). The third conceptualization of QOL is in terms of the experiences of the individual. Specifically, if a person perceives his/her life as good and desirable, then according to this logic, it must be so (Diener and Suh 1997).

With the above broad perspective in mind, it is now prudent to note that tourism activity can influence QOL perceptions in a given community as well as for the tourists themselves. To address the first, Moscardo (2009) offers a framework illustrating how various tourism activities can influence the QOL in the generating region (where the tourist is from), in the transit region, and in the destination region. Along these lines, Vermuri and Costanza (2006) posit that these influences can take place by influencing one or more of the following types of capital: (1) social [networks and quality of relationships that exist between individuals], (2) human [health, personal skills, educational achievement, and opportunity], (3) physical [infrastructure and facilities], (4) financial [financial assets that individuals or groups can access], and (5) natural [the ecosystem]. Hence, if a traveler passes through or resides in a particular area, each of these five forms of capital can be influenced (Moscardo 2009).

Next, how do tourism activities fuel tourist’s QOL perceptions? Research indicates that participating in memorable experiences such as vacations often has a larger impact on one’s QOL perceptions than consuming material goods (Oppermann and Cooper 1999; Richards 1999). The quintessential importance of vacation consumption in the minds of many consumers is demonstrated by evidence that suggests that tourism is more income inelastic than many other forms of personal spending (Ryan 2003). In other words, a reduction in personal income or an increase in a tourism pricing structure does not decrease one’s demand as much as such circumstances would have on other spending categories (Ryan 2003).

In an effort to help explain and predict tourism activities’ influence on the tourist’s QOL perceptions, Sirgy (2010) has proposed a QOL theory of leisure travel satisfaction founded upon goal theory. This emerging QOL theory relies upon four anchoring premises: goal valence, goal expectancy, goal implementation, and goal attainment (Sirgy 2010). According to Sirgy, goal valence transpires when one’s satisfaction with his/her leisure travel consumption is bolstered by opting for the pursuit of travel goals in which goal achievement has a high probability of triggering heightened levels of positive affect in intended life domains. Since positive affect is known to enhance life satisfaction (Andrews and Withey 1976; Campbell et al. 1976), the contribution of the positive affect resulting from travel experiences toward one’s QOL seems plausible.

Second, the concept of goal expectancy pertains to the notion that leisure travel satisfaction is enhanced by choosing to pursue leisure travel goals that are achievable and the pursuit of these outcomes is congruent with other life facets. Hence, goal attainment would ensure high levels of positive affect in the intended life domains (Sirgy 2010). Generally speaking, individuals

typically possess greater satisfaction as they are pursuing feasible goals as opposed to unrealistic ones (Vallacher and Wegner 1989). It is also prudent to note that the probability of goal fulfillment is enhanced when the selected goal aligns with one's other psychographic and situational characteristics such as available resources and cultural norms. Moreover, motive, cultural, and resource congruence with the desired outcome can increase one's QOL perceptions (Sirgy 2010).

Third, the goal implementation tenet suggests that leisure travel satisfaction is bolstered when individuals actually take action to implement their goals (Sirgy 2010). Specifically within this context, translating abstract goals to concrete ones fuels this cause (Linderman and Verkasalo 1996) as does one's genuine commitment to the goal (Henry and Lovelace 1995). In sum, according to Sirgy (2010), goal implementation enhances the probability of goal attainment and the consequent positive influences on QOL perceptions.

Lastly, the principle of goal attainment posits that leisure travel satisfaction can be realized through the attainment of travel goals which can ultimately result in heightened QOL sentiment (Sirgy 2010). According to this logic, however, it is important to recognize the accomplishment (Thurman 1981). Likewise, research also indicates that frequent and less intense attainment of goals might be more beneficial than less frequent and more intense attainment (Diener et al. 1991). Nevertheless, regardless of frequency and intensity, in general, goal attainment enhances feelings of positive QOL.

Summary of Existing Qualitative Tourism QOL Studies

How have studies utilizing qualitative methods contributed to tourism QOL theory development? To address this question, this research searched for all such articles. The search was conducted in the Google Scholar search engine using key phrases such as "focus group quality-of-life," "host quality-of-life," "interview quality-of-life," "qualitative quality-of-life," "quality-of-life," "resident quality-of-life," "tourism quality-of-life," and "tourist quality-of-life." To the credit of the Editors of this tourism QOL handbook (Uysal, Sirgy, and Perdue), this search was also facilitated by a tourism quality-of-life bibliography that they have gradually compiled through the years.

While we attempted to be as systematic and thorough as practically possible in our literature search, we readily concede that it is unlikely that we have located and included all pertinent studies. Therefore, we extend a sincere apology to those researchers who have contributed to this stream of literature, but whose publication(s) went undetected in this literature review. That said, the tourism QOL studies employing qualitative methods that we detected in this process are displayed in Table 4.1. A total of nine studies were found dating back just over a decade. Table 4.1 reports the qualitative techniques used, the sample populations investigated, and the major findings of each study. Interestingly, as enumerated in the final column of Table 4.1, the foci of these nine studies are almost evenly split between tourism's impact on community QOL (four studies) and tourism's influence on the traveler's QOL perceptions (five studies).

The authors of the nine studies primarily relied upon traditional, widely utilized qualitative techniques such as depth interviews and focus groups as opposed to less-mainstream techniques that have been utilized in other streams of hospitality and tourism research such as photo elicitation interviews (e.g., Botterill and Crompton 1996), childhood memory elicitation procedures (e.g., Braun-LaTour et al. 2006, 2009), or sentence completion tasks (e.g., Magnini 2009). In our judgment, the authors of the content analyzed studies demonstrated creativity in the sample populations that they investigated, e.g., cancer patients (Hunter-Jones 2003), caregivers (Mactavish et al. 2007), and T'ai Chi practitioners (Yau and Packer 2002). Each of these nine studies also appears to make unique incremental contributions to the body of QOL literature.

Table 4.1 Chronological listing of existing tourism QOL studies that have utilized qualitative techniques

Author(s)/year	Qualitative technique(s) employed	Sample population investigated	Summary of major findings
Brunt and Courtney (1999)	Open-ended questionnaire	Permanent residents in a host community	Local residents' perceptions of the sociocultural impacts of tourism appear to coincide with those reported in extant literature
Yau and Packer (2002)	Focus groups	Elderly T'ai Chi practitioners	The regular practice of T'ai Chi among the elderly seems to improve both their physical and mental health
Hunter-Jones (2003)	Depth interviews	Cancer patients	Holiday-taking can play a significant role in enabling patients to make the transition from illness back to "normal" health
Gjerald (2005)	Depth interviews	Permanent residents in a host community	Local residents do not view tourism as a detractor of QOL in the local community (at least at this stage of destination development)
Mactavish et al. (2007)	Focus groups	Family caregivers of individuals with intellectual disabilities	Vacations serve myriad roles for caregivers of individuals with intellectual disabilities
Lord and Patterson (2008)	Depth interviews	Physically disabled	Participation by the physically disabled in appropriate leisure activities enhances multiple aspects of their QOL
Schwartz and Campagna (2008)	Open-ended questionnaire	Elderly	Participation by the elderly in appropriate leisure activities enhances multiple aspects of their QOL
Wheeler and Laing (2008)	Case studies (combination of interview and secondary data)	Tourism stakeholders in a host community	"Liveability" may moderate the relationship between tourism and economic and social well-being
Moscardo (2009)	Narrative analysis	Bloggers on Google	The research advances a framework that posits that characteristics of the tourist, the generating region, the transit region, and the destination region should be considered when assessing tourism's influence on QOL

A major determinant of the value of a qualitative research endeavor is the *sensitivity to the context* in which the study is positioned (Elliott et al. 1999; Yardley 2000). *Sensitivity to context* can be demonstrated through a keen awareness of pertinent literature streams (Yardley 2000). In our assessment, the extant body of literature that uses qualitative methods to explore facets of tourism QOL does a reasonably sufficient job in its coverage of pertinent research. Brunt and Courtney (1999), for example, in their exploration of local residents' perceptions of sociocultural impacts of tourism, extensively review the following three research areas: (1) social impacts of tourism development (e.g., Mathieson and Wall 1982; McKercher 1993), (2) social impacts of tourist-host interactions (e.g., de Kadt 1979; Pizam et al. 1982), and (3) cultural impacts of tourism (e.g., Cohen 1988; Collins 1978).

Sensitivity to context can also be communicated by how well the study's conclusions stem from the data itself (Smith 2003). In our judgment, the studies that we content analyzed also demonstrate that the conclusions really do stem from the data. For instance, the focus group studies (Mactavish et al. 2007; Yau and Packer 2002), each audiotaped his/her respective sessions, transcribed the tapes, and coded and analyzed the narratives in accord with commonly accepted guidelines for such processes (Rust and Cooil 1994).

Accounting for how sociocultural milieu in which the study takes place demonstrates *sensitivity to the context* (Smith 2003). Generally speaking, the studies included in this review afforded adequate attention to sociocultural nuances within the studies' settings. For example, when interviewing cancer patients, Hunter-Jones (2003) ensured that the informants themselves were encouraged to select an interview location that put them most at ease so that the free flow of dialogue could be triggered. Likewise, when Lord and Patterson (2008) interviewed physically disabled individuals, accommodations were made to account for those who could not readily travel to particular interview sites.

Evidently, *rigor* also contributes to the validity of a particular qualitative inquiry (Yardley 2000). In this context, *rigor* mainly manifests itself through the appropriateness of the sample for the particular research endeavor as well as the completeness of the analysis undertaken (Smith 2003). As a whole, in our assessment, adequate levels of *rigor* were apparent in the qualitative studies reviewed here. For example, regarding appropriate samples, the studies in this content analysis that employed permanent residents of a host community as subjects (Brunt and Courtney 1999; Gjerald 2005) each seemed to provide reasonable justification for the sampling frame selections. Regarding completeness of analyses, as previously noted, the focus group studies (Mactavish et al. 2007; Yau and Packer 2002) adhered to accepted qualitative research guidelines (Rust and Cooil 1994) by audiotaping their respective sessions, transcribing the tapes, and coding and analyzing the narratives. Such a process of open coding allows for the emergence of novel dimensions, and subsequent axial coding explores connections between the concepts (Strauss and Corbin 1988).

Directions for Future Research

Extending the discussion of validity from the previous section, a study's *impact and importance* are also critical drivers of validity in qualitative research (Yardley 2000). In other words, what incremental contribution does a given study make to existing knowledge? With this issue in mind, we contend that the existing body of studies that employ qualitative methods, while useful and rich in many respects, only begins to scratch the surface of what is waiting to be discovered within the realm of tourism QOL.

Regarding ways by which tourism can enhance QOL in a host community, with the exception of Moscardo's (2009) research that touches upon the five forms of capital, the existing body of

qualitative studies does not address tourism's influence on physical capital or natural capital in host communities. Opportunities are ripe for exploration within these areas. While the attention of the popular press often focuses upon tourism's negative environmental consequences, qualitative methods that probe deep into individual's thoughts and motivations can possibly elicit novel insights regarding sustainable and volunteer tourism and how tourism activity can sometimes enhance a host community's QOL by contributing to the area's natural capital.

Likewise, while existing qualitative studies contribute in certain ways to our knowledge, much more research is warranted that examines tourism's ability to bolster the QOL perceptions of the traveler. For example, within the context of Sirgy's (2010) QOL goal theory of leisure travel satisfaction, existing qualitative QOL tourism studies shed very little light on the four dimensions of the theory. Regarding goal valence, the rich data often generated in qualitative research iterations may prove useful in gaining a better understanding of how individuals determine which goals have the highest probability of resulting satisfaction. Moreover, how is this goal conceptualization → resulting satisfaction prognostication influenced by psychographic and situational factors?

In terms of goal expectancy, there is a need for both fine-grained and course-grained research examining how individuals assign probabilities of goal attainment in their mental accounting systems: course-grained by examining how personality and attitudinal variables influence the process and fine-grained by mining deeper into the subconscious shafts of one's mental processes to consider constructs, such as self-efficacy and the influence of one's self-concept dimensions. Next, with regard to goal implementation, question laddering that can be incorporated in the use of many qualitative approaches makes it possible to gain a better understanding of how individuals go about developing strategies through which to achieve their travel-related goals.

Qualitative approaches may also prove fruitful in developing a better understanding of goal attainment perceptions. When does a traveler concede that a particular goal has been attained? What are the QOL correlates involved with attainment? What factors moderate or mediate the attainment → life satisfaction causal path? For example, do the quantities of time, money, and energy that the tourism activity detracted from other valuable social relationships moderate the casual path between attainment and satisfaction? What role does cognitive dissonance play? Are some individuals more prone to experience cognitive dissonance than others?

While the research questions posed in the preceding discussions can be addressed with a variety of approaches, three qualitative techniques that we view as having significant potential in this area are photo elicitation interviews, childhood memory elicitation, and sentence completion tasks. As previously stated, each of these three qualitative approaches have been applied to the study of other areas of hospitality and tourism, but according to our literature search, they are currently absent from the study of tourism QOL.

Photo Elicitation Interviews

Again, we posit that one research technique that can be used to gain insight into tourism's contributions to community and individuals' QOL perceptions is photo elicitation. Photo elicitation is a research method that uses pictures to guide interviews and to stimulate discussion during those interviews (Klitzing 2004). Although the photographs employed in the interviews may depict something very specific or material, they can trigger discussions that embody philosophies, ideas, and cultural beliefs (Becker 2002; Berger 1992). This dialogue can be readily elicited for a number of reasons. First, unlike with traditional interviewing, in photo elicitation interviews, the researcher often does not specify the salient attributes being investigated. Second, because the discussion is driven by a photograph(s), photo elicitation interviews are less susceptible to questioning style and questioning sequencing bias than information derived in

traditional interviewing approaches (Buchanan 2001). Third, photo-driven interviews sometimes evoke taken-for-granted nuances of the informant's community or life that trigger discussions (Clark-Ibanez 2004). Fourth, in photo elicitation interviews, the photographs reduce the asymmetry in power between the researcher and the participant (Clark-Ibanez 2004). Regardless of these benefits, photo elicitation is an underutilized method (Harper 1998; Prosser 1998) and has yet to be applied on a wide-scale basis to tourism studies and, as far as we are aware, has never been applied to tourism QOL inquiry.

The idea of employing photographs to spawn thoughts and dialogue in an interview has existed for some time. Much of the early work research and conceptual thought was brought forth by John Collier. For instance, Collier (1957) applied the technique to research mental health practices in Canada. In this context, he examined how Canadian family units adapted to ethnic diversity. In other early work, Collier (1967) enumerated photo elicitation methods in his visual anthropology book.

In more recent years, various forms of photo elicitation have been applied in numerous settings. Such areas include sociology, psychology, anthropology, ethnography, education, and community health (Carlsson 2001; Collier and Collier 1986; Harper 1994; Wang 2003). In a sociology application, for example, Gold (1986) used photo-driven interviews to research ethnic identification. In terms of pedagogical research, Diamond (1996), Weiniger (1998), and Salmon (2001) employed photo elicitation to explore particular facets of preschool and elementary education. Likewise, numerous researchers have used the photo elicitation technique in the healthcare arena to research various aspects of nursing, medicine, and gerontology (Hagedorn 1996; Higgins and Highley 1986; Magilvy et al. 1992).

In addition, photo elicitation has been employed by researchers to assess tourist perceptions of particular travel destinations (Boterill 1989; Botterill and Crompton 1987, 1996). Cederholm (2004) used photo elicitation interviews to interpret backpackers' experiences, while more recently, Garrod (2008) employed photo elicitation to compare and contrast residents' and visitors' perceptions of given locations. Also in a tourism context, photo elicitation has been used to evaluate consumers' reactions to destination printed advertisements (Magnini and Gaskins 2010).

There are now a number of books and articles that enumerate various approaches to photo elicitation (see Banks 2001; Harper 2002; Pink 2001; Rose 2001; van Leeuwen and Jewitt 2001). In summary, however, there are three primary approaches to photo elicitation: auto driving, reflexive photography, and photo novella (A.K.A. photo voice). *Auto driving* involves the interviewees "driving" the discussion about photographs that were usually provided by the researcher (e.g., Collier 1967; Suchar and Rotenberg 1994). Auto driving is likely the most common form of photo elicitation (Harper 1994) and also the one that is likely associated with the most promising applications for tourism QOL research because it allows the researcher to gain new insight on the matter being researched. We postulate that auto driving could provide rich insights into tourism's contribution to community QOL, as well as, into the research questions outlined above regarding goal valence, expectancy, implementation, and attainment. Interestingly, emerging auto driving studies such as one conducted by LaTour et al. (2003) actually employ 3-D photo interviews in an effort to prompt even more thoughts about the photo(s). So, for example, rather than simply having interviewees view two-dimensional pictures, photo-editing software in combination with viewing glasses can actually place the interviewee within the context of the photo. We contend that the potential applications of this 3-D approach in tourism QOL research should not be ignored.

The second type of photo elicitation is *reflexive photography* that entails the interviewees taking photographs and then reflecting upon the deeper meaning of their photographs. Lastly, *photo novella* encompasses asking interviewees to take pictures that they best feel represent their daily habits and common events and then asking them to relay their meaning (Hurworth 2003; Warren 2005; Wang and Burris 1994). Like the case of reflexive photography, the potential utility

of reflexive photography and photo novella in investigating tourism's impacts on community and travelers' QOL perceptions is abundantly apparent. Researchers could gain rich insights by having informants discuss photos that they have taken and the symbolism and deep meanings that are represented by them, not to mention their perceptions of personal value that arises from their desire to take a photograph of the setting in question for posterity.

Childhood Memory Elicitation

An additional qualitative method that may hold potential in advancing tourism QOL knowledge development is childhood memory elicitation. Although this qualitative approach has yet to be applied to tourism settings (as far as we are aware), recent works have elucidated the value of assessing earliest and defining product memories (Braun-LaTour et al. 2007; Braun-LaTour and LaTour 2007) as a *complement* to other methods of inquiry. In fact, Braun-LaTour et al. (2010) found that this technique yields significantly more robust childhood memories than focus groups with much more salient affect associated with the brand of focus.

According to Braun-LaTour et al. (2007), probing earliest memories (EMs) has its roots in psychoanalysis as a projective technique and begins the autobiographical process. Given the reconstructive nature of memory (Braun 1999), people fill in the missing elements of their memories and "project" personality and lifestyle preferences therein. Hence, this gives such memories symbolic value as "part fact, part fiction" especially as it involves brands.

Of course, this technique, like others born from psychoanalysis, must be adapted for application to marketing and tourism settings. Given time constraints, this is a multistep process that allows for "cutting to the chase" in a timely manner. To surface memories prior to the age of 10, participants are instructed to "dig up" memory jarring pictures and/or talking to family members about such. This is followed by a yoga meditation process as autobiographical memories are aided through this relaxation process. The exercise also involves meditation and taking the participants through a "memory walk" tied to key events in society (e.g., presidential elections etc.). Participants are then instructed to write down experiential descriptions and draw EM (earliest memory)-related brand imagery.

Defining memories are also important to the consumer self and heavily depend on person-brand interfaces in adolescence (Braun-LaTour and LaTour 2007). These "how do I fit in" focused memories and reconstructions are also useful outputs of this technique. For example, Braun-LaTour and LaTour (2007) found in a study of memories of the legendary In-N-Out hamburger chain experience that defining memories for that experience and associated emotions was very robust for those exposed to such during the teenage years. Following the initial memory walk exercise which in itself yields useful data, an optional step entails selecting a subset of participants for follow up with 90-min depth interviews which contributes additional rich textual data.

Multijudge coding involves an extensive structured process analyzing the nature of events, age of occurrence, types and degrees of emotion associated, who else was involved etc. These "stories" were also assessed for the degree of similarity within or between generations in order to look for potential archetypes or emerging "myths" of actionable value to managers (Braun-LaTour et al. 2007). As emphasized, such an approach is time efficient and can be synergistically combined with other qualitative techniques. Moreover, using local informants who inhabited the destination as children could glean rich information regarding tourism's impact on a community's quality-of-life, whereas, traveler informants in the process could be useful in gaining a deeper understanding of tourism activities' effects of traveler's QOL perceptions. It seems likely that nostalgia and childhood memories provide motivation for some travel

efforts; thus, childhood memory elicitation could prove useful in such cases. Further, it also seems plausible that some parents travel with the impetus of exposing their children with the same or similar travel experiences that they recollect having as children; thus, the method could also be particularly useful in understanding these multigenerational travel habits, patterns, and expected outcomes. Evidently, child-parent relationships are key components of QOL perceptions within the context of family units.

Sentence Completion Tasks

The third qualitative technique that we contend holds promise in advancing tourism QOL knowledge, if properly applied, is a sentence completion procedure. Qualitative sentence completion tasks entail offering participants sentence stems and asking them to insert a word or phrase that they feel best completes the sentence. Within the context of the study of tourism's influence on host community QOL, sentence stems may include: "The most important contribution that tourists make to our community is _____," or "Tourists benefit our local community by _____." Regarding the research of travel activity's impact on an individual's QOL, examples of sentence stems may include: "I select travel goals that are _____," or "Attainment of one of my travel goals makes me feel _____." Of the previous two examples, employing the first stem can provide insight into the goal valence and goal expectancy dimensions of Sirgy's (2010) QOL theory of leisure satisfaction, and the latter can potentially lend insight into informants' goal attainment perceptions.

The creation of this semistructured projective technique is typically attributed to research conducted by Herman Von Ebbinghaus in the late 1800s (Rhode 1957). Carl Jung's word association test may also have been a precursor to the sentence completion task discussed here (Rhode 1957). In recent years, sentence completion tasks have increased in popularity among researchers, in part, because they are easy to develop and easy to facilitate. They are used in numerous disciplines including psychology, sociology, management, education, and marketing. In a restaurant-marketing study, Magnini (2009) applied sentence completion tasks to hospitality and tourism research by asking Korean-Americans and non-Korean Americans to view a virtual tour of a restaurant and then complete the following sentence: "The restaurant is a good place to go when...." The research found that Koreans-Americans were more likely to insert a collective phrase than US born non-Koreans. Moreover, those Korean-Americans utilizing an integration pattern of acculturation were more prone to demonstrate a collective mindset in the sentence completion task than those employing an assimilation pattern of acculturation.

There are several reasons why we contend that the sentence completion tasks might be particularly suitable as a qualitative iteration in a tourism QOL study. First, one of the major benefits of a sentence completion approach is that it elicits "spontaneous" responses (Brinthaup and Erwin 1992). In sentence completion tasks, subjects are able to express their views in their own words and use the type of meaning that makes sense to them (Westerhof et al. 2000). In doing so, the sentence completion phrase contains what the respondent considers salient or relevant (McGuire and McGuire 1988) as opposed simply "reacting" to a Likert-type item (Brinthaup and Erwin 1992). More specifically, when the impetus of a research project is to unravel dimensions and structures of self-concept of in groups with different life situations [often a goal in tourism QOL studies], then spontaneous self-report methods are often an ideal technique (Damon and Hart 1988; L'Ecuyer 1992; Lapierre et al. 1993; McCrae and Costa 1988; McGuire and McGuire 1988).

Second, sentence completion tasks are often particularly appropriate in cross-national research because even if proper back-translation of Likert-type items has occurred, interpretations of the

meanings of the items can vary across cultures hindering the reliability of the quantitative results (Malhotra et al. 1996). Since tourism research often entails cross-national data collection scenarios, this benefit is particularly applicable to tourism QOL research. For example, if researchers in a host community are investigating the perceptions of a population of overseas visitors, sentence completion tasks might prove useful as a component of a research “tool chest.”

Lastly, sentence completion tasks typically circumvent the problems associated with social desirability bias because the subjects complete the sentence stems without being aware of the predictions that are being tested in the given research (Boddy 2007; Fisher 1993). Thus, if respondents in tourism QOL studies are suspected of potentially consciously or even sub-consciously providing socially desirable responses, then a sentence completion iteration could aid in minimizing this bias.

Conclusion

“Much qualitative research has been criticized for its lack of objectivity, replicability, validity and generalizability, and has been relegated to the role of the ‘poor cousin’ of quantitative research. Unfortunately, these criticisms are often well founded” (Zalan and Lewis 2004, p. 507). In other words, few would likely refute the limitations inherent in qualitative approaches. With these limitations acknowledged, it is also fair to state that qualitative data sometimes holds meanings and insights not typically associated with quantitative data.

The existing body of qualitative QOL tourism studies is small, but makes useful contributions to our knowledge. Of the nine studies analyzed in this research, four focus on tourism’s impact on community QOL and five address tourism’s influence on the traveler’s QOL perceptions. In our assessment, as a whole, they do a sufficient job demonstrating *sensitivity context*. This *sensitivity to context* is communicated through awareness of pertinent literature, generating conclusions that stem from the data, and accounting for sociocultural milieu. Moreover, appropriateness of samples and completeness of analyses also appear to exhibit appropriate *rigor*. Nevertheless, we believe this body of qualitative QOL research to be in its infancy stage with much room for expansion.

As enumerated in the previous section, future qualitative extensions can provide further insight into the roles of the five forms of capital surrounding tourism’s influence on community QOL. Qualitative approaches can also be utilized to delve deeper into the goal valence, goal expectancy, goal implementation, and goal attainment dimensions of Sirgy’s (2010) QOL goal theory of leisure travel satisfaction. In both of these applications, a number of qualitative methods could be appropriate, but three that we have identified as being absent and holding significant promise are photo elicitation interviews, childhood memory elicitation, and sentence completion tasks. Nevertheless, regardless of approach, the potential ability of qualitative inquiry to provide novel insights in the area of tourism QOL should not be ignored.

A qualitative method can be used as a stand-alone approach in a study, but may receive some criticism regarding lack of reliability and validity. Alternatively, qualitative methods can be employed as the first iteration in a qualitative → quantitative research sequence. For example, photo elicitation narratives and/or sentence completion phrases can be used to add validity to survey design procedures. Conversely, although not as common, some research problems call for a quantitative → qualitative research sequence. Such situations arise when survey data surface information that mandates additional probing. Again, many fruitful opportunities exist for qualitative applications in tourism QOL research.

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Chapter 5

Poverty Elimination Through Tourism Dynamics

Manuel Vanegas, Sr.

Introduction

Despite that poverty reduction has become one of the leading goals in the development agenda, despite all of the development efforts of the last 60 years, despite the establishment of the Pro-Poor tourism (PPT) agenda, the Sustainable Tourism Eradication Poverty (ST-EP) and of the so called poverty reduction strategy paper (PRSP),¹ the issue of unacceptable levels of poverty still persist. According to the available statistics, both the absolute number of poor people has increased and the number of countries with least developed status (LDCs)² has increased from 25 in 1971, to 31 in 1981, and to 52 by late 1990s (Cheru 2006; Craig and Porter 2003; Dijkstra 2005; IMF 2004; UNCTAD 2008; Whitfield 2005; WB 2004).³

The developing world,⁴ in particular LDCs, are achieving strong rates of economic growth since 2000 – near 7% on average – and this economic growth has been stronger than in the 1990s. We note, however, that this economic growth is failing to filter down significantly into poverty reduction and/or improved quality-of-life (QOL)⁵ for the majority of their population and has been associated with only marginal increase on the pace of poverty reduction, contrary to expectations. In this context, the relationship between economic growth and poverty has weakened since 2000. As a result, the probability of reducing the incidence of poverty by half at the end of 2015 in the developing world has been diminished. In addition, most of these countries, in particular the LDCs, are also off track to achieve most of the other Millennium Development Goals (MDGs), by all United Nations Member States in 2000.

¹As an attempt by the International Monetary Fund (IMF) and the World Bank (WB) to enhance developing countries' focus of economic growth on poverty, marginal progress has been made in reducing or even eliminating poverty.

²As defined by the United Nations Conference on Trade and Development (UNCTAD).

³In the beginning of the 1990s, there were 52 countries classified as LDCs; however, thanks to tourism expansion, two of them have left this infamous list by early 2000s: Botswana and Mauritius. After Cape Verde graduated from LDC status on December 2007, 49 countries remain on this list.

⁴To avoid confusion in definitions, developing countries and developing world as defined by the World Bank will be used interchangeably. The UNCTAD's definition is used when we refer to member countries under the status of LDCs.

⁵My own definition goes beyond the welfare and the United Nation Human Development Index. It considers subjective human feelings when he/she gets a job, and income, and contributes to the development of his/her society.

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Marginal Progress

Why this marginal progress in poverty reduction? This result can be explained by five reasons:

1. The basic framework of the development model in place has been able to generate a type of economic growth lacking a wide spread transmission mechanism.
2. With few exceptions, many governments either have not taken eradication of poverty seriously or have failed to make the connection between economic growth and eradication of poverty, or both.
3. Both defining the causes of poverty as being the same everywhere and conceptualizing poverty and hunger as a singular, universal problem have blurred solutions and established deep-rooted difficulties in identifying the development linkages, the trade-offs, the synergies, the financial decisions, and the management schemes that accompany any economic growth and eradication of poverty programs, interventions, or activities.
4. The goal of eradicating poverty and hunger has engendered a preoccupation with the identification and measurement of two different goals in one. In fact, the spheres of defining and measuring poverty and hunger lines are different, the causes of poverty and hunger are not the same, and the current poverty and hunger eradication efforts are different.
5. The restricted condition under the IMF and WB Poverty Reduction Strategy Paper framework (PRSP).

This type of economic growth dynamic is often concentrated on agriculture base, free export processing zones, manufacture enclaves, and capital intensive natural resources extraction sites with lower multiplier values and few forward and backward linkages with other sectors of the economy. Such a model of development, in general, benefits limited segments of the population, generates modest levels of new jobs, and does not significantly increase income distribution nor impacts the level of private consumption. Trends in economic growth and poverty reduction that are taking place in developing countries and that were presented above are related to the economic growth model, policy directions, and planning strategies which have been pursued in most developing countries. I note that the current pattern of economic growth is not solid, does not have enough connectivity, and does not possess a large set of transmission mechanisms to enhance the distribution of the benefits from economic growth. This economic situation tends to perpetuate pervasive poverty in developing countries worldwide.

The double dimensionality of poverty and hunger presents a challenge primarily if we are seeking the appropriate configuration of problems that might be addressed in both, rather than seeking particular or independent configurations and solutions for each different goal. Even causality becomes a challenge in the context of the universal goal of poverty and hunger eradication for what might be a cause of the problem labeled as poverty in one region or community might not be the cause of other problems labeled in the hunger context.

Under the PRSP, governments, multilateral and bilateral institutions, and non-governmental organizations (NGOs) are pushed or committed to increasing public expenditure on targeted public service programs.⁶ For the small number of indicators for which it is possible to get information for various developing countries, I note the emergence of the following evidence. On the one hand, some countries are making more progress on the MDGs which depend mainly on the level

⁶The PRSP is the anchor for the IMF, the WB, and the donor community for several financial assistance packages and is also the key condition for receiving debt relief under the Highly Indebted Poor Countries Initiative (HIPC). A number of studies, however, suggest that the development of philosophy, design, practice, and applicability of the PRSP does not live up to the ideals that motivated its creation (Carr 2008; Cheru 2006; Craig and Porter 2003; Dijkstra 2005; Molenares and Renard 2003; Piron and Evans 2004; Vanegas 2005a, b; Whitfield 2005).

of food transfers and public service provisions. For example, increasing primary education enrolment outstrips progress in improving access to water, which in turn outstrips progress in sanitation. On the other hand, progress in advancing the MDGs, which depends more on the generation of family incomes, such as poverty reduction, has been slowest (UNCTAD 2008).

From my perspective, a basic message emanating from this chapter, therefore, is that it is time for a paradigm shift in economic growth and policy development management. The economic growth policy shift now required is a shift in sector development focus and deeper changes in implementation approach, which puts tourism expansion, tourism capability to create economic and development opportunities, and tourism foreign exchange generation capacity at the heart of development policies both to promote higher levels of economic growth and to accelerate poverty reduction in developing countries. It means the design and implementation of wealth creation of a sector paradigm led by tourism expansion.

This tourism sector expansion-led poverty reduction paradigm integrates tourism in a framework of enhanced widespread creation and transmission of wealth and poverty reduction mechanisms. I argue below that this tourism sector paradigm postulates the presence of arguments in which tourism becomes a main determinant of overall long-term economic growth, tourism expansion has the capacity to propel a bigger economic growth muscle to seriously attack poverty at scale, and tourism, per se, fits well into the MDGs interpretation of poverty alleviation. In this respect, it challenges both the conventional agriculture and manufacture economic growth approach and the sequential approach to development.

Reconciling Tourism, Development, and Poverty

If we accept the undocumented assertion that tourism expansion, development, and poverty reduction are being increasingly linked, then the convergence of tourism expansion and poverty reduction reflects a significant change in the theory and philosophy of tourism and development (Ashley et al. 2000; Ashley and Roe 2002; Blake et al. 2008; Bowden 2005; Carbone 2005; Christie 2002; Croes and Vanegas 2008; Deloitte and Touche 1999). The tourism sector, it is argued, offers a well-structured road through which developing countries can both enhance the levels of economic growth and effectively work as an instrument to reduce or even eliminate poverty, as tourism is a growing economic sector in most countries with high levels of poverty (UNCTAD 1998, 2008; WTO and UNCTAD 2001; WTO 2002, 2004a, b). On the one hand, however, despite the worldwide recognition of the potential of tourism expansion as a development instrument, policy implementation, and research, the empirical evidence or basic knowledge of the relationship between tourism response to economic shocks, causality, and poverty reduction remains relatively untapped and has attracted only a small group of investigators within governments, the bilateral and multilateral organizations, and academia.

On the other hand, the private sector, rightly so, has produced considerable tourism-related research, investigating the ways to maintaining the profitability of the corresponding tourism industries. As a result, the perception persists that tourism researchers have generally failed to position themselves in the void between the tourism development industries, which often do not appreciate the poverty-reducing impacts of tourism and the tourism industries themselves, which generally do not see reducing poverty as their priority, or goal, or responsibility (Overseas Development Institute 2006). In this context, the world's tourism–development–poverty relationship over the past 60 years can be characterized with five broad chronological and conceptual frameworks, or paradigms best described as changes in sector development policy focus. The discussion below is intended to illustrate each of the five paradigms as to how tourism development, economic growth, and poverty reduction have been linked in the last 60 years. This illustration, however, will be combined with my own personal opinions and theoretical thoughts.

Blind Rebirth Evolution, 1950s–Mid 1960s

Whoever has the opportunity to analyze the tourism and economic data after the Second World War (for example, France, Italy, and Spain as tourism destinations and the Nordic countries as tourism origin countries) will find that during the 1950s and well into the mid-1960s, economic life was highly uncertain for businesses, painful for people, and insecure for all war-torn societies. In this context, tourism offered a window set of opportunities to help in the healing of a wounded society, to help in the reconstruction efforts, to help in the push of economic growth, and to help in the creation of new jobs. During this period, tourism contributed significantly to the reconstruction and modernization of the developed countries of Europe through economic growth, employment generation, building of tourism infrastructure, and improved QOL.

In terms of both tourist arrivals and tourism receipts, international tourism increased dramatically between the early 1950s and mid-1960s. Tourist arrivals were over 112 million in 1965, or 4.5-fold increase over the 25 million tourist arrivals in 1950, while tourism receipts increased 5.5-fold from US\$ 2.1 billion to US\$ 11.6 billion over the same period. For its part, Europe sustained an average annual growth rate of near 11.2% in tourist arrivals and near 16.7% in tourist receipts between 1950 and 1965, or early postwar period. This postwar prosperity, in part propelled by tourism expansion, in one way or another, defused the social issue of inequality, or fair distribution of benefits in European society. As QOL improved throughout the economy, it became difficult even for social reformers to get exercised over the unequal distribution of benefits. This is why I have named it the *Blind Rebirth Evolution of Tourism*.

With increased economic growth as the society's first economic goal, the tourism sector and other industries have been able to supply tourism products and services, employment, and other needs of European population. The reason for this, I contend, was threefold. First, economic growth had emerged as a means of acquiring material goods, increasing security, and reducing social struggles. Second, the shadow of scarcity still held society in pain. Third, a constantly war-free increased economic growth was the surest path to social transformation and tranquility.

Promotion and Dilemma, Mid 1960s–1970s

For their part, the developing countries – after failing to propel economic growth to relatively higher levels, increased levels of poverty, and heavy debt burden – started to seriously consider that tourism has a justifiable role to play as an agent of economic growth. During the mid-1960s and the 1970s, a group of developing countries witnessing the success of the postwar Europe heralded a new economic growth management approach, one which centered on tourism expansion. Borrowing from Jafari's (2001) advocacy platform, tourism was *promoted* by its economic value and its contribution to foreign exchange. Using the new tourism database of the WTO, my own estimations indicate that between 1965 and 1980, developing countries' tourism receipts increased at an annual growth rate of near 11.3%,⁷ while merchandise exports, excluding oil, increased at an annual growth rate of near 7.4%.⁸ Supported by this evidence, tourism development

⁷Calculated using the following exponential equation: $Y = \alpha X^{\beta \text{Time}}$, where β multiplied by 100 provides the annual average growth rate.

⁸Trade barriers and the perennial uncertain world market for agriculture and raw materials, tourism provided a well-structured instrument to enhance the generation of foreign exchange, creation of new jobs, and a platform for economic diversification.

promoters contended that tourism expansion can contribute to economic diversification away from a dependency on a few agriculture exports, in particular, in many LDCs with modest capabilities for rapid development of their manufacturing sectors (Boo 1990; Cater and Lowman 1994).

The growing demand to develop tourism is reflected in the number of developing countries implementing tourism supporting programs, projects, and interventions, among others, Aruba, Bali, Barbados, Costa Rica, Dominican Republic, Egypt, Fiji, Gambia, Greece, Jamaica, Kenya, Mexico, Morocco, Saint Lucia, Tunisia, Turkey, and Uganda. Concurrently, a number of bilateral, multilateral, and development institutions in a lukewarm mode also came on board to endorse the tourism expansion agenda. As a result, tourism development in these developing countries is well established to harness the competitive force of global tourism, is well linked into their local economies, is already important and making a significant contribution to their economies, and is helping to reduce their levels of unemployment and poverty. Tourism established itself as an economic paradigm, created brand name tourism destinations, demonstrated its capability to transform previously undeveloped areas, both economically and socially, and proved that the domestic and international private sectors are capable of working together with the public sector.

But from a different perspective, tourism emerged as a full-fledged pundit on the development scene, sparked ideological rigidity, and created a similar national and international institutional *dilemma*. On the one hand, created a dilemma in developing countries at the national policy making level between the established agriculture growth sector and the promotion of a new growth sector such as tourism, and on the other hand, created a dilemma in the international structural development level between significantly increasing financial resources in favor of a tourism-led economic growth platform and the structural adjustment platform-based economic growth. There is no doubt in my mind that the tourism-led economic growth platform was a real promise generating positive results for the developing countries in comparison with the promotion of modest, low, or sometimes next-to-nil economic growth based on agriculture, manufacture, or nontraditional exports.

Nonetheless, the message was clear. Employment had to be increased, poverty had to be eliminated, and the balance between agriculture, manufacture, and tourism had to be redressed. Investment on tourism development must be increased, and long-term public planning needs to be combined with short-term private decision making. Yet the bulk of researchers, academia, and the international institutions still believe that agriculture was a better development platform to transmit benefits and that manufacture remains the next useful instrument of transmission.

Reluctantly, however, directly or indirectly, among others, the World Bank, the Inter-American Development Bank (IDB),⁹ and other development institutions began funding tourism investment in the late 1960s. According to Hawkins and Mann (2007), the World Bank established the Tourism Projects Department in 1969 to meet countries' demand for tourism development and prepared a tourism sector strategy in 1972 in support of tourism development as an economic growth tool for specific countries. By late 1970s, however, the WB has reached the decision to close the Tourism Projects Department, and by the early 1980s, the WB systematically disengaged from its ongoing tourism project commitments and gradually abandoned the tourism sector.

Taken together, the evidence is clear: the bilateral and multilateral institutions and the donor community at large decided to close the door to a really tourism export-oriented economic growth sector and moved into areas of structural adjustment and policy reform conditional lending. With respect to the WB, this is not surprising due to (1) its biased lending practices in favor of agricultural development to fight hunger and increase food security, (2) its problem of commitment

⁹The ADB based in Philippines and the IDB based in Washington DC are financial intermediaries owned by both developed and developing countries which provide long-term financing for development within their own region.

volume in which both regional offices and staff were judged more by the new projects for which they obtained executive approval and had financial resources committed, (3) its lack of tourism capacities and expertise, and (4) its multiple of objectives set by management and approved by its member countries.

Perils and Negative Ideology, 1980s

Although tourism growth has slowed somewhat in comparison to the initial takeoff period, its overall strong impact as an economic force continued into the 1980s, with an average annual growth rates of near 5% and near 12.1% in tourist arrivals and tourist receipts, respectively.¹⁰ There was no doubt, however, that tourism presented a powerful argument for the adoption by most developing countries of an export model anchored or guided by tourism development. According to the evidence available and avoiding the causal acknowledgment and technical analysis, developing countries, among others, Aruba,¹¹ Costa Rica,¹² Dominican Republic, Jamaica,¹³ Kenya,¹⁴ Mauritius, Mexico, Morocco, Nicaragua, South Africa, Tanzania, Tunisia, and Zimbabwe were successful in generating foreign exchange, enhancing economic growth and QOL, creating a needed mass of new employment, and attacking poverty (Andronicou 1979, Ashley and Mitchell 2005 Croes and Vanegas 2008; Hawkins and Mann 2007; Mitchell and Ashley 2006; Vanegas and Croes 2003, 2007).

Resilient and unabated, during this period, tourism has provided the creation of national forward and backward linkages both promoting a more balanced economic growth and distributing the benefits of economic growth in community, sectoral, regional, and QOL terms. Like a well-assembled cast, however, international institutions, researchers, and academia found tourism contradictions and started to both vilify the reliance on tourism as an economic force and brought out, without the appropriate evidence, tourism *perils* and tourism *negative* influence (Wilson 1979). By the late 1970s and during the 1980s, both researchers and international institutions were either indifferent to or outright critical of the potential opportunities that tourism could hold for the developing world. Moreover, many development institutions have a relationship with tourism that is ambivalent at best and, at times, hostile (Goodwin 2005; Hawkins and Mann 2007; Mitchell and Ashley 2006).

Tourism has been criticized as a strategy for economic development because it is associated with the *dependency* model upon an external and often fickle source of growth (Britton 1980, 1982; Bryden 1973; de Kadt¹⁵ 1979, 1992; Erisman 1983; Perez 1973). Reports on this dependency issue, however, appear with disconcerting frequency in the tourism development literature. Britton (1982) gives emphasis to tourism's degenerative nature because of uncontrolled growth and/over-exploitation of natural and cultural resources. This negative attitude was either a result or a reflection of both the ongoing literature of that time that tourism development was an unsound option for economic growth and that the focus on hunger and poverty should be based on

¹⁰ Author's own calculations using the WTO new tourism time series database.

¹¹ Tourism development replaced oil refining, stabilized the current account of the Balance of Payments, defeated poverty, and brought full employment by 1992.

¹² This country, established its name as the vanguard in green ecotourism.

¹³ This country improved both its overall food security level and its overall living standards.

¹⁴ This country, established its name as the vanguard in Safari and Wildlife.

¹⁵ In his dualistic approach, de Kadt did not concentrated on poverty. He recognized the dualistic impacts of tourism expansion: on the one hand, the creation of linkages and opportunities, and on the other, the creation of inequalities.

the development of agriculture, or nontraditional exports, or on enclave free zones promotion. In some quarters, this critical attitude is still prevalent today (Brohman 1996; Copeland 1991; Mitchell and Ashley 2006; Pastor and Fletcher 1991; Rao 2002; Shepherd and Fritz 2005; Wilkinson 1987).

My own reading of this critical dependency argument is that international tourism in developing countries is brutal; is a representation of the dominance of high-income developed countries; favors multinational corporations; may add to already apparent inequalities between developed and developing countries; and is almost inevitably exploitive of the local economy, of the people, of the culture, and of the environment. In fact, tourism seems best avoided unless it is so small scale, native owned, environmentally responsive, and totally genuine that it goes out of sight from the normal view (Brohman 1996; Burns 1999; Hawkins and Mann 2007; Sindiga 1999).

Sustainability and Pro-Poor, 1990s

By the end of the 1980s and beginning of the 1990s, the circumscribed area of universal policy reform and structural adjustment seemed woefully inadequate to both sustain economic growth and ameliorate poverty of the developing countries. In the meantime, during this period, the world had seen at firsthand how near 2.7 billion of the world's inhabitants live on less than US\$ 2 per day (overall poverty), while near 600 million of these live in extreme poverty with less than US\$ 1 per day. The poverty problem demanded a broader perspective. In this gloomy portrait, it seems that tourism is one of the only bright spots. In other words, the tourism–poverty focus was born in direct response to criticism of the effects of policy reform and structural adjustment programs which have been imposed on many developing countries, to the so-called lost decade of the 1980s which increased poverty, and to the failure of both agriculture and transplanted manufacturing based development to reduce poverty.

Even today, in the developing countries, the redistribution of land to construct small farmers, the limited access to capital, the limited capacity to adopt new technology, and the unstable and modest market expansion for food and agriculture products have failed to create new demand for jobs and as a result have entrenched poverty and despair (Dent and Peters 1999). On the other hand, the growth of manufacturing based on imported inputs and technology in these economies (for example, free zones enclaves and call centers) has not been able both to absorb the labor surplus and to evolve as an integrated process of development. In fact, in many poor countries, it has increased inequalities. This is so, at least in the case of call centers, because the poor lacks the needed language skills to access employment.

It seems like in a conspiracy plot. Indeed, a revision of the actual development literature indicates, however, that was this decade which simultaneously, or sequentially because tourism out reach of remote and fragile places, because tourism free trade configuration, because tourism development of strong private–public partnerships, because thanks to tourism more countries leave UNCTAD's infamous list of LDCs, and because tourism resilient and advancing development from all quarters gave birth, among others, (1) in the early 1990s, to *Sustainable Development in the Context of Tourism*. The sustainable paradigm joined the green agenda of the 1980s, the Brundtland Report in 1987, and the UN Rio Earth Summit in 1992 and prepared the path for the ideology of social and environmental sustainability; (2) in the late 1990s, both to *Pro-Poor Tourism*¹⁶ (Deloitte and Touche 1999; DFID 1999; Goodwin 1998) and to *Poverty Reduction Strategy Papers*¹⁷

¹⁶Identify as PPT, it means tourism that generates net benefits for the poor.

¹⁷Identify as PRSP, was introduced as a more participatory, poverty-focused alternative to standard Structural Adjustment Program.

(IMF and IDA 1999a, b); and (3) in the early 2000s, to *Sustainable Tourism-Elimination of Poverty*¹⁸ (UNWTO 2002, 2005).

According to Hawkins and Mann (2007), the creation in 1991 of the Global Environment Facility indirectly opened the door to the World Bank and the United Nations Development Program (UNDP), for tourism dimensions to be included in a host of new projects. The environmental and sustainability facility used the benefits generated by the tourism sector to justify investments in support of environmental and cultural reservation. Then, it was followed by the Development Assistance Committee (DAC) of the Organization for Economic Cooperation and Development (OECD) in 1996 (Mitchell and Ashley 2006). As a result, these institutions established International Development Targets, the precursors of the United Nations Millennium Development Goals (Scheyvens 2007).

But what does the United Nations have to do with tourism development and poverty reduction? At the 2005 UN Summit in New York geared to review the MDGs, the UN institutions, among others, UN Food and Agriculture Organization (FAO), UN International Fund for Agriculture Development (IFAD), UN Conference on Trade and Development (UNCTAD), UN Development Program (UNDP), and UNICEF jointly with governments, non-governmental organizations (NGOs), and representatives of the private sector gave support to a proposal put forward by the United Nations World Tourism Organization (WTO),¹⁹ which called for tourism to take its place in national development plans to help developing countries to fight the war on poverty. This redirection of tourism poverty reduction focus, however, proved tempting. As stated by Storey et al. (2005, 30) and cited by Scheyvens (2007, 123), tourism has provided a powerful rallying cry – a new development mantra – for those in development practice and charged with garnering flagging political and financial support for aid programs.

An Awful Tourism Poverty Paradox, 2000s Onwards

The suppliers of the above new approach to fight poverty had to be specific about what instruments constituted the old approach to fight poverty and where the old approach has been abridged. What finally makes the old approach to fight poverty obsolete is therefore not some new re-patched idea but a radical change in the reality to fight poverty which is the object of that re-patched idea. To reclaim their reputation throughout the world in the years ahead, the international organizations must move on beyond the rhetoric in terms of ideas and the direction of planned interventions. Yet many, if not all, of components of the international configuration are reluctant to move. This is why I have named it *The Awful Tourism Poverty Paradox*.

From my perspective, which reflects the author's own academic and professional background, the need was clear: We must both explain the persistence of relative high poverty and define a new economic growth route based on tourism development with the task of bringing higher levels of both economic growth and poverty reduction in developing countries. But what does the evidence show us? First, at the World Bank, as stated by Hawkins and Mann (2007), the WB's management believed that both the markets and the private sector were the most appropriate growth engine for developing countries and that tourism-focused lending would not be necessary. Moreover, the WB decided that there will be no more tourism lending to developing countries' national development finance companies. In other words, by a magic trick, other financial resources to finance tourism expansion will appear and be available. By fiat, the role of tourism

¹⁸Identify as ST-EP.

¹⁹Near 2 years prior to the UN Summit, the WTO became a specialized agency of the United Nations.

development and the fight against poverty was passed to the WTO, UNCTAD, and the UNDP. As today, the WB does not have a direct tourism for poverty alleviation program.

What an awful paradox! Tourism is promoted as a private sector-led export-oriented development, offering relative larger opportunities for national and international private–public partnerships, but none of these institutions possesses the financial muscle to support tourism development in developing countries.²⁰ In this context, it is worth noting that more than anything else, enhancing mutually forward and backward beneficial economic linkages between governments and private businesses will provide energy to an expanding tourism sector.

Second, let's look at the statistical facts of this paradox. On the one hand, as stated by Mitchell and Ashley (2006), an analysis of total bilateral and multilateral disbursements by the Development Assistance Committee (DAC) during 2003 and 2004 revealed total support for tourism at US\$ 153 million – or an average amount of near US\$ 77 million per year. This financing in support of tourism initiatives represents a meager near 1% of DAC's total net official aid flows. Moreover, the results of a preliminary analysis that I did on the World Bank lending portfolio, or as Hawkins and Mann (2007) called a total active portfolio, indicates that this figure, as an average, is even less than 1% during the 2000–2007 period.²¹ Moreover, both the IDB and the AFDB tourism lending portfolio are even less. For its part, the ADB is financing various infrastructural projects in support of tourism in the lower Mekong Basin and with the Netherlands Development Agency (SNV) supporting community-based tourism. On the other hand, as stated by Mitchell and Ashley (2006), the UK's Department for International Development, which launched pro-poor tourism internationally in 1999 but has subsequently shifted away from specific support to the sector.

Third, the tourism-led poverty reduction message from the United Nations World Tourism Organization is confusing: To assign money in support of community tourism and small poor enterprise initiatives. Guiding or establishing ST-EP and/or PPT focus to be separated or detoured away from the macro instruments and policy actions of traditional, or mass, or general tourism development is a big economic growth–poverty reduction strategy error. Why? The answer is simple: tourism is both the most prominent economic sector that has the economic muscle to seriously tackle poverty worldwide (Harrison 2008; Mitchell and Ashley 2006; Croes and Vanegas 2008) and the domestic and international private sector that has the muscle in terms of knowledge, capital, and expertise to seriously help developing countries to develop their tourism sector. In this scenario, international institutions should get on board, have a *participatory* role, and give financial support to the current and potential role of traditional tourism in attacking poverty and bringing higher levels of QOL.

Fourth, both at the IMF, internally, and at the international community at large, the PRSP promotes the ideas of poverty alleviation, of country ownership, of government-led process, and poor people participation. The reality and results, however, are different. For example, on the one hand, ownership cannot be possible rest with the LDCs and count with the participation of their poor people if the whole idea is a top–down development product of a UK's bilateral institution,

²⁰ A critique of UN experience on tourism development, back in 1998: On the above issue and being the United Nations Chief Technical Advisor to the Government of Aruba, I was told by the Minister of Tourism and Economic Affairs, “master plans, studies, and policy advise will not propel tourism. The gulf between access to finance and tourism policy implementation needs to be filled. Look into our experience, poverty is not there.”

²¹ As a matter of fact, having contributed directly in the preparation of both the Nicaragua Competitiveness Project and the National Development Plan which for the first time hinted the idea about a new route for economic growth does not have or did not receive, directly or indirectly, assigned monies for tourism. Similar evidence (including the IMF and World Bank) has been found in other African, Asian, and Latin American countries (Coyle and Evans 2003; Government of Nicaragua 2001, 2002; International Monetary Fund 2004; McGee et al. 2002; Molenaers and Renard 2003; Vanegas 2002, 2005a, b; World Bank 2004).

the World Bank, the IMF, the United Nations World Trade Organizations, and the OECD (Bond 2006; Dijkstra 2005; Kamruzzaman 2009; Molenares and Renard 2003). Moreover, the whole idea of the PRSP undermines the well-being of the poor (Bond 2006), and the PRSP has brought few benefits to the poor in much of the developing world (Cheru 2006; IMF 2004; IMF and IDA 2002; Whitfield 2005; WB 2004; WB and IMF 2005).

Dollar Democratization and Connectivity with the Poor

The tourism system, per se, is export oriented and international in range. Tourism involves not only a large-scale movement of people, monies, enterprises, and culture in which developed, developing, and least developed countries participate but also changes in one component of the tourism system that echo back throughout the tourism system. Therefore, to fully comprehend the echo back of the tourism system and to manage effectively its respective components require four elements: (1) both understanding the decision-making process and the construction and analysis of the echo back forward and echo back democratic process²² between origin and destination countries, (2) to grasp the connectivity or transmission process which define the symmetric and asymmetric echo back linkages and echo back leakages between tourism origin and destination countries, (3) to understand the establishing of the transmission process to reach the poor, and (4) the building of knowledge.

Continuum Construction

As shown in Fig. 5.1, the tourism system is unique in the sense that the tourist, or consumer, to be able to buy the tourism product and services, to participate, and to be paid back with the experience, the tourist has to be brought in from the origin country to the tourism destination. This transmission and receiving process will generate the primary opportunity to echo back wealth and income from residents of the origin country to both residents and governments of developed, developing, and least developed countries. In this context, we need the tourist and we need to understand the decision-making process.

From my vantage point, in tourism policy development management, there is no need for tourism negotiations; the borders already, have been, still are, and will remain opened up, and with both money and a passport, barriers to enjoy the tourism experience are nonexistent. In other words, when the tourist has reached the tourism destination and crossed the customs stop line, the dollar in a symmetrical or asymmetrical manner begins, unstoppable, to reach people and the national economy. Moreover, when compared to other exports of the current account of the balance of payments, there are fewer or no opportunities to construct barriers. In other words, once he/she has made the decision to engage with the tourism system, the democratic or free searching information process to choose a tourism destination package is triggered. The now potential tourist begins to connect with the tourism infrastructure and different suppliers – tour operators, travel agents, and so on – available at the origin country to select his/her tourism destination, mode of travel to and in destination, accommodation, and other activities. When the tourist has paid his/her tourism package, the dollar begins to construct the first round of both its echo back circulation mechanism (origin and destination) and its echo back connectivity with the poor transmission mechanism.

²²From the freedom to decide perspective.

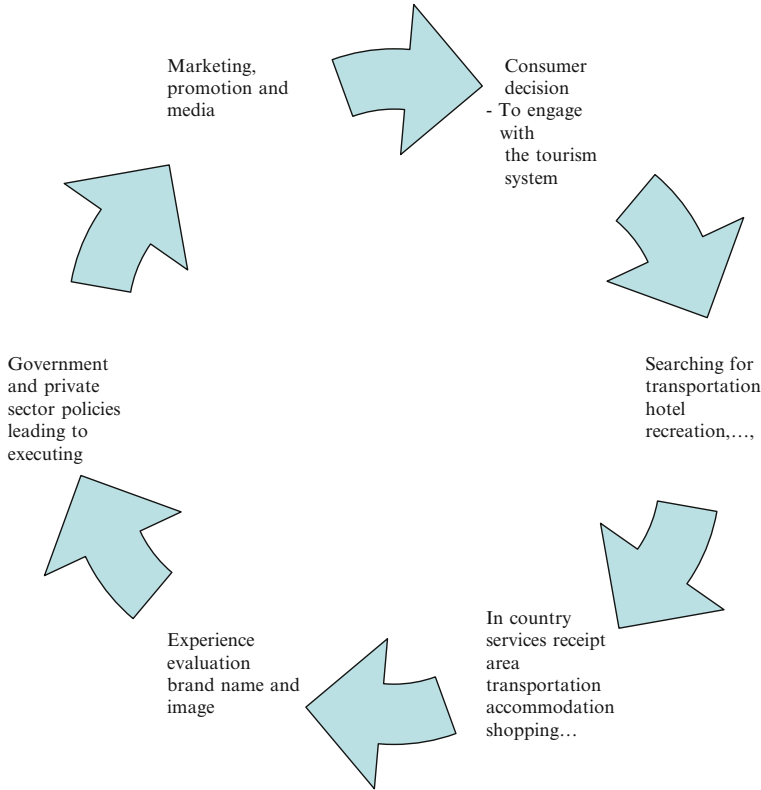


Fig. 5.1 Dynamic of the continuum of tourism

Connectivity Process

Can an adequate connectivity framework be established within the destination and achieve change and at the same time reach the poor? The answer is yes, but local benefits and its distribution, including the poor, have to be viewed using three different lens: the quantity and quality of the connectivity infrastructure, the profitability of the tourism system and its corresponding industries, and the government development infrastructure in place. All this means, the forward and backward tourism linkages are permeating into the tourism destination economy. In this context, the main echo back connectivity links are represented by the government infrastructure which is the first connection link with the local economy, by the transportation, the accommodation, the food and beverages, the shopping, and the recreation and entertainment infrastructure which are the next tourism connection links with the tourism destination economy.²³

In this connectivity link framework, on the one hand, I am talking about the tourist free movements and free circulation of the dollar, the direct contact with the immigration and customs officers, the quality of the human capital receiving the tourist, the government receipts as a result of the tourist paying service fees, taxes, entry visa,..., coupled with the exchanges taking place between the tourist, the private sector, and the tourism destination's residents at large. On the other hand, with respect to the poor, because in one way or another some of this income

²³It excludes tourists that use any other means of transportation.

will reach them via public and private sector current and capital spending. How big is the nature of the impact? It depends on the nature of the tourist activity itself, the characteristics or tourism supply of the tourism destination, and how big is the role tourism is playing in the economy.

Reaching the Poor

For developing countries, given the labor intensity of the tourism system, one of the main transmission mechanisms to reach the poor is through the creation of mass employment and income opportunities – carpenters, construction workers, gardeners, waiters security, cleaners, maintenance staff, clerks, drivers, artisans – for the unemployment and underemployment during the construction of the tourism infrastructure and then, during the operational and expansion stages of the tourism system. It is important to note that these categories of work are extremely important in the broad context of creating employment for the unskilled and poor residents of the tourism destination. It is obvious that implicitly, I have assumed that as the tourism system is developed, the local labor employed is trained. Those with a better education will be trained for better and more senior posts. For example, a Master Thesis study comparison of poverty alleviation through tourism development in Costa Rica (Alajuela, La Fortuna, Puntarenas, San Jose, and Tamarindo) and in Nicaragua (Granada, Leon, Managua, Masaya, and Montelimar enclave) by Hugo (2009), for instance, reports that:

Tourism is great it brings more jobs, helps people that are poor, and provides opportunities for local people to increase their individual income through multiple types of jobs, some paying more than occupations that are not related to tourism.

And as the tourism system expands, so does the need to develop businesses and infrastructure. Therefore, in the echo back forward linkages, opportunities are created, among others, for the development of new small businesses to provide tourism products and services; created for the expansion and creation of new airports, ports, roads, sewage, and water treatment (e.g., Aruba, Liberia-Costa Rica, Curaçao, El Salvador, Honduras, Nicaragua, Panama); created and expanded for the development of cultural heritage; and created to develop remote and fragile areas which have little or none of the required resources to develop agriculture, manufacturing, free zone, and call center businesses. Both these types of democratic circulation of the dollar and tourism connectivity framework which develop links with the tourism system and expand its size of the tourism system are central in the poverty reduction agenda (Croes and Vanegas 2008; Vanegas and Croes 2003).

From the above connectivity framework, tourism should create strong echo back backward linkages for agriculture production for the tourism system, rather than linkages to imports, and for construction given the expenditures for hotels and other infrastructure. The demand for artisan handicrafts will create an echo back linkages back to local painters, souvenir producers, cottage industries, and small factories. The additional demand for public services will create another echo back linkages back to government spending on these services. Moreover, these backward linkages are adaptable to labor intensive technology and are therefore employment creation, as well as capital saving and foreign exchange creation which is vital to the balance of payments of many developing countries. With respect to the poor, assuming that labor is drawn for employment from both the unemployed and the traditional agriculture sector, the acquired skills resulting from tourism expansion provide them with increased mobility and better skills are transferred into the rest of the economy. Of course, these benefits will be less when full-inclusive enclaves and time shares tourism are considered.

Evaluation and Marketing Dynamics

It does not matter whether a tourism destination in the developing world has been developed, is being developed, or will be developed in the near future; it is essential to build on its capabilities. A destination needs to harness and manage well the elements of the continuum dynamics of the competitive management framework. In terms of numbers and quality, it would allow an increased number of loyal repeat tourists: to attract new potential tourists, to enhance the strength of the democratic circulation of the tourism dollar, and to reinforce the transmission mechanisms for the poor.

Being Competitive

At the economic and business management level, being competitive means that there is a need to have the capability in place to evaluate the tourism experience, provide the feedback to policy makers, and appropriate the financial resources needed to engage in fruitful marketing strategies. In this context, it means (1) to be able to deal profitably with the echo back leakages of promoting and advertising at the international level, (2) to be able to construct alliances and partnerships and join business ventures to protect and enhance its brand name and image, to improve the quality of its tourism product, and to expand the tourism product supply, (3) to be able to select the best markets and invest wisely its marketing and promotion dollar, and (4) to be able to develop a viable, credible, and convincing tourism supply strategy with its targeted investments in infrastructure, marketing, and promotion to request for the corresponding partnership of financial support from the international development assistance community.

Stable Social and Environment Fabrics

Obviously, tourism development does exert an impact on the social and environmental fabrics of a destination. Therefore, there is a need to design and manage well a social and environmental framework to both guard and enhance the national culture and to preserve the environment – topography, geography, and natural and man-made resources – through beach maintenance, sewage treatment, garbage disposal, and so on. Social and environment stability is not merely technical; it is strictly linked to the survival and viability of the tourism system. This need to be addressed squarely and cautiously, consistent with both the national and the international interests as related to country's brand name and image. On this issue, it is worth noting what has been reported by Hugo (2009):

Owners and managers in Costa Rica concluded that tourism benefits the community and is the best thing to happen to this country. Before there was pollution and deforestation. Now there is more conservation and laws to protect the environment.

Knowledge and Research

Tourism contribution to fight poverty was first noted in the 1970s, but this kind of merging was confused in the futile ideological debate over development in early 1980s and late 1990s. Borrowing from Bowden (2005) and Croes and Vanegas (2008), Fig. 5.2 shows the merging of

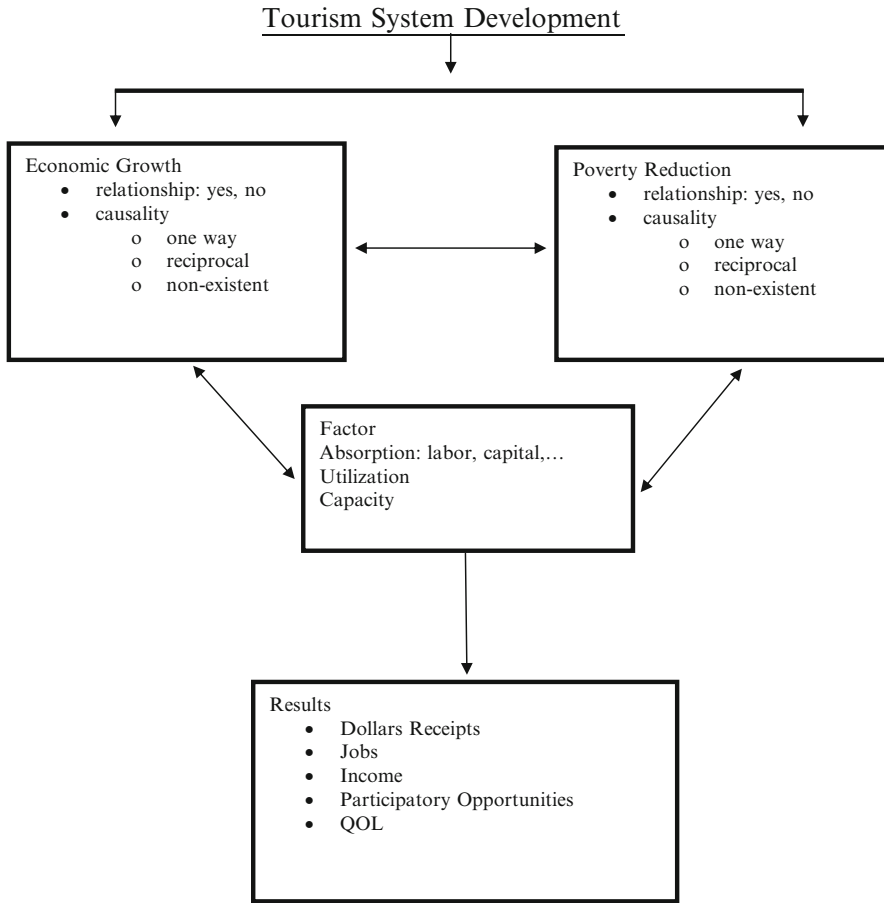


Fig. 5.2 Nexus: tourism system development–led economic growth

tourism and poverty, previously two separate domains (Bowden 2005). As stated above earlier, this type of connectivity represents a drastic redressing in the philosophy of tourism development and poverty reduction. *Knowledge* to date, however, on its relationship, implications, and impacts on poverty reduction is ideologically biased and limited in scope. Moreover, research has been largely fragmented, superficially analyzed, scarce in methodological development, lacks consistency, and relatively set aside by the tourism researchers and institutions. Because for tourism researchers the poor is not directly the focus for their research, one can clearly conclude both that the impact of tourism on poverty reduction has been rather indirect and that most of the available research reveals the hazards of the tourism system (Bowden 2005; Brohman 1996; Cater 1987; Copeland 1991; Mitchell and Ashley 2006; Rao 2002; Scheyvens 2007; Zhao and Ritchie 2007). The end result has been lack of empirical analysis to inform international organizations, governments, and the tourism system at large.

Then, to what degree the tourism system contributes to have a significant share in bringing about poverty reduction? Several scholars using observation strategies have considered the impact of tourism on the poor, often as part of wider anthropological tourism *research* (Chambers 2000; Freitag 1994; Groupe Huit 1979; van den Berghe 1994; Wilson 1979). Some others did as part of tourism system’s linkages with the agricultural sector and as part of community-based tourism, while another group did it as part of an option for development (Fayissa et al.

2008; Gunduz and Hatemi 2005; Harrison and Schipani 2007; Katircioglu 2009; Kim et al. 2006; Oh 2005; Page 1999; Proença and Soukiazis 2008; Tonamy and Swinscoe 2000; Torres and Momsen 2004). The conclusions have been mixed. On the positive side, some of them have recognized that tourism can create jobs; generate foreign exchange earnings, well linked into the national economy through its echo back linkages; create economic opportunities for small businesses; and improve the QOL of the poor, among others (Croes and Vanegas 2008; Page 1999; Tonamy and Swinscoe 2000; Vanegas and Croes 2003).

The seminal empirical work by Croes and Vanegas (2008), using cointegration and causal analysis, is the only empirical study that investigated the convergence (as presented in Fig. 5.2) of tourism development, economic expansion, and poverty reduction using the country case of Nicaragua. The results indicate (1) a long-run stable relationship between the three variables, (2) a one-way Granger causal relationship between tourism development and economic expansion, (3) a one-way Granger causal relationship between tourism development and poverty reduction, and (4) a reciprocal or two-way Granger causality relation between economic expansion and poverty reduction. Therefore, an empirical nexus of tourism expansion and poverty reduction is established in the Nicaraguan economy.

In the case of tourism expansion and economic development nexus in Taiwan, Kim et al. (2006) using a Granger causality test, found out (1) a long-run equilibrium relationship between the two series and (2) a bidirectional causality between tourism and economic growth. However, OH (2005) found (1) that there is no long-run equilibrium relation between the two series and (2) that there is one-way relationship of economic-driven growth in Korea. Meanwhile, Gunduz and Hatemi (2005) found that the tourism-led growth hypothesis is supported empirically in the case of Turkey. However, Katircioglu (2009), using the bounds test and Johansen approach to cointegration, revisited the case for Turkey and did not find any cointegration between tourism expansion and economic growth.

In summarizing the nature of literature on tourism, economic growth, and poverty worldwide, at least three generalizations can be made: (1) very little substantial or rigorous quantitative material exists, particularly in scholarly sources; (2) the information which is available consists mostly of community case studies, general impact statistics, and descriptive information of the potential for growth and poverty reduction; and (3) the data and its quality and methodological approach need improvement. From the above discussion of tourism–poverty literature, it is very clear that many important facets of merging tourism and poverty have not been researched. Therefore, many potential benefits to be derived from scholarly inquiry are yet to be realized. The section below does not propose to identify all types of needed research but merely to outline a few selected examples of work believed to be particularly relevant to present-day developments in the tourism system.

For the last 30 years, the tourism system is, perhaps, the most important leading sector in many African, Asian, and the Caribbean countries which has helped to stabilize their economies, increased food security, and reduce unemployment and poverty. Today, yet little is known concerning the impact of tourism on poverty and its echo back linkages with agriculture and the other sectors of their economies. Then the following question is valid. In what capacity and degree can governments, the international and national private sector, and the international development agencies assist the development of the tourism system, such that without jeopardizing its business viability, would generate increased benefits for the poor? Here, among others, I am talking about, on the one hand, tourism system studies of tourism development, economic growth, and poverty and focus more on researching the current and potential role of general, or traditional, or mass tourism in reducing poverty and bringing higher levels of economic growth and poverty reduction and, on the other hand, about introducing long-term changes in business and development practices such that joint venture businesses are constructed between the international institutions, the national and international private sector, and the government of the destination countries.

Conclusion

Strategies for tourism development, however, have been found to be effective in unlocking opportunities for the most vulnerable groups within the tourism sector. In fact, in tourism policy development management, there is no need for tourism negotiations; the borders already have been, still are, and will remain opened up, and with both money and passport, barriers are nonexistent. This both democratizes the dollar and produces an echo back linkages of people between the residents of the origin market and the tourism destination. Moreover, the evidence is there, in more than thirty countries that I have worked and lived in (including 16 years of medium and long-term assignments with the UN), I have seen socialists, capitalists, communists, developed and developing countries, small islands, and LDCs follow both the route of tourism as a priority instrument of economic growth and development and compete ferociously in the international market to transport more tourists to their tourism destinations. All these build echo back linkages and democratize the dollar.

When the tourist makes the decision to engage in tourism activities and arrives at the tourism destination, he/she starts, unstoppably moving – visiting tourism sites; buying from locals; and exchanges culture, social, and other values – and buying local tourism products and services. All these both build echo back forward and backward linkages and democratize the dollar.

Moreover, the tourism system is not vertically integrated; on the contrary, it is fragmented both at the national and at the international level, and when the tourist buys a tourism package, he/she is buying goods and services from a number of different suppliers. In other words, the tourism system possesses relatively a strong capacity to avoid the building of monopoly and oligopoly powers. All these democratize the dollar.

Finally, I am a believer that if tourism system is properly incorporated into development strategies, it can be a corner pillar of new productive systems aimed at significantly reducing unemployment, increasing incomes, and eradicating poverty. Of course, it goes without saying that the successful development of tourism initiatives involves harnessing a wide range of domestic and international stakeholders. In this regard, for many developing countries and particularly the least developed countries, tourism offers real opportunities.

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Chapter 6

Tourism, Poverty Relief, and the Quality-of-Life in Developing Countries

Robertico Croes

Introduction

The purpose of this chapter is to explore the conceptual foundations and to assess the empirical relationship between poverty relief, quality-of-life (QOL), and tourism in the context of developing countries. It is argued that the meaning of poverty and quality-of-life has been closely entwined in the development studies debate and that tourism has the potential for encouraging an improvement in the global quality-of-life. This chapter consists of two main sections: The first section explores the meaning and measurement of poverty and QOL, and its links to tourism development; the second section examines the empirical relationship of these concepts.

Poverty and QOL have never been so prominent on the international agenda. The Millennium Development Goals (MDG) of September 2000 catapulted the eradication of poverty and the increase in QOL of the poor as key global concerns. The MDG now provides the main justification for promoting economic growth and development. Poverty is considered a more serious global problem than climate change, terrorism, or the state of the global economy, according to a recent global poll of the BBC World Service (http://www.globescan.com/news_archives/bbcWorldSpeaks-2010, retrieved February 19, 2010). The prospects for a more comprehensive assessment and understanding of the well-being of the poor people in the world have never been so good.

The Poor of the World

Poverty manifestations are far-reaching with an uneven global distribution. The poor are concentrated mainly in East Asia, South Asia, sub-Saharan Africa, and some regions in Latin America and the Caribbean (Croes and Vanegas 2008). Poverty effects prohibit opportunities, resulting in human suffering: manifesting itself in poor health and longevity, injustice, lack of family and community support, and violence, as well as denial of opportunities to participate in public affairs decisions.

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The poor live under circumstances of insecurity, have seasonal incomes, and live in remote, unhygienic, and resource poor areas. They seem vulnerable to health crises, catastrophic weather, crime, and unemployment. Their poverty results from lack of incomes and social safety nets, poor health and lack of education, and discrimination. They also lack information and suffer from poor government services and corruption. Poverty further represents itself in inaccessibility to good medical facilities, illiteracy, irregular income, informal employment, multiple occupations, lack of land tenure for housing, lack of basic infrastructure quality, disempowerment, and personal insecurity (World Bank 2004).

Basic services in health, education, water, and sanitation fail the poor. While governments typically spend a third of their budgets on these services, they spend very little on poor people. Consider, 799 million people (17% of developing countries) are undernourished; every day 25,000 children starve to death (UNICEF 2008); and over 20,000 die of extreme poverty – up to 8,000 die from malaria, 5,000 from tuberculosis, 7,500 young adults from AIDS, and thousands from diarrhea and respiratory infections (Sachs 2005). The aggravating gap that separates rich from poor is a major concern. For example, the poorest 20% of the world's population accounts for 1.5% of the world's private consumption, and the richest 20% consumes 77% (World Bank 2009). Within developing countries, the imbalance of the consumption of the rich and poor is also appalling. In Brazil, the richest 10% consumes 50% of the economy, while the poorest 50% consumes 10%.

The abysmal situation of the poor has enormous consequences for the global economy as productivity is wasted because of poverty, thereby robbing millions of an opportunity for a better quality-of-life. De Soto (2000) claimed that the poor, by being excluded from social arrangements such as private property, cannot use their assets as collateral to raise capital and hence are excluded from crucial credit opportunities. They are denied economic facilities that afford participation in trade and production. According to De Soto (2000), about US \$9 trillion of property (not legally owned) is wasted – terming it “dead capital.”

Defining the Poor: The Debate

For over 50 years there has been an ongoing debate about the meaning and measurement of the poor (Ruta et al. 2007). The debate moved from identifying poor according to resources, potential, and conditions to ability, opportunities, and outcomes, and also from viewing people as poor if they perceived themselves deprived, or if they had incomes less than some socially determined standard. The debate has generated rather different policy formulations over time. Clarification of how poverty is defined is important because different definitions of poverty imply the use of different indicators for measurement.

This may lead to the identification of different individuals and groups as poor thereby requiring different policy solutions for poverty relief. For example, Helwege and Birch (2007) indicate an alarming number of inconsistencies of how poverty is being measured in Latin America, which has shown that poverty rates vary in Latin America depending on the international agencies. This may wrongly influence the debate about the quality-of-life experienced by the poorest in the region. Szekely et al. (2000) also indicated inconsistencies in identifying the poor in 17 Latin American countries.

The central issue revealed in the debate is, what constitutes a good society and good living. Since the time of Aristotle, this philosophical, sometimes moral, issue has been at the forefront of the discussion about the purpose of humankind. Over the course of time, different views were expressed about the meaning of the good society and good living. These views encompass the identification of the constituent elements of life, i.e., are these material in nature, or do they

include social, cultural, and political aspects? Are they to be measured by income levels (command of resources) or by the freedom to live the life one values (capabilities)? And, should the indicators capture what may be achieved or what is actually achieved by individuals?

Several perspectives pitted against each other regarding these important issues, and implicitly addressed an important underlying issue, i.e., whether one definition and measurement of poverty is at all possible, and whether it is exportable to any context and time (Ruta et al. 2007). This latter question is still present today, captured in the debate between Sen and Nussbaum regarding the possibility of an unbiased list of central capabilities that could make the capability approach operational. Nussbaum (2000) suggests a list of ten “central human functional capabilities,” which was strongly opposed by Sen, who insisted that capabilities should depart from the individual and therefore are contextual in nature.

The debate about the meaning and measurement of poverty may be captured in three main paradigms, which will be briefly discussed below.

The Income Poverty Paradigm

The income poverty paradigm historically defines poverty in an instrumental way. Poverty was seen originally as the lack of resources (income, calories, etc.) to cover a basic minimum set of necessities for an individual to work. Historically, this meant a minimum budget was needed to buy a certain amount of calories, plus some other indispensable purchases (such as housing). Poverty from this perspective was considered as the inability of individuals to afford a minimum bundle of goods and services that affect their well-being, particularly in the sphere of economic productivity (Bourguignon 2006). This notion of poverty evolved during the Industrial Revolution and was closely linked to Bentham’s conception of utility as the foundation of human well-being (i.e., satisfaction, happiness, and realization of desires).

Later, the meaning of poverty was conceived as the lack of opulence and was assessed in terms of possession of commodities (goods and services), which has led to the diffusion of real income and GNP as indicators of economic well-being. The key assumption here is that income or expenditures are the result of individual preferences and that these preferences are related to the maximizing objective inherent in human beings (Bourguignon 2006). Differences in income and expenditures are the outcome of individual choices, and these choices result in differences in welfare and standard of living. Implicitly, this assumption implies that individuals transform income into welfare in the same way.

The paradigm presumes that individual consumers use their income to buy marketed goods and combine these goods with time, knowledge, and nonmarket goods to provide a more preferable quality-of-life. It infers, therefore, that the value consumers place on a product can be identified by observing their actual consumption of the product without having to discuss the reasons or motives behind their choice. From this perspective, it can be stated that a consumed good provides greater utility than a good that has not been consumed. Thus, for example, consuming Barbados rather than Antigua means that the Barbados product provides greater utility to the consumer than the Antigua product.

All individuals and households are assumed to be identical, except for a small correction in terms of deflation and the use of an equivalence scale to control for household composition. Individuals were assumed to somehow convert these inputs in the betterment of his/her life, and there was an implicit assumption that individuals possess the same ability or interest in making this conversion (Grosh and Glewwe 2000). The valuation of necessities is estimated via market prices, and via the imputation of monetary values for those items that do not have market values (e.g., public goods and social goods, such as schools, clinics, the environment).

The poverty income paradigm reduces poverty to an economically determined condition deficient in providing a minimum income. The poor are defined as someone whose resources fall under a particular level or threshold, a so-called poverty line (Ravallion 1998). This line may be defined in absolute terms, such as the \$1 or \$2 a day per person used by international organizations. Or, it may be referred in relative terms as some percentage of the median or the mean income of the whole population (or the distribution of income of the population). The focus on economic conditions – measured as GDP – is seen more as inputs needed to improve the individual well-being with a disregard for outcomes derived from the income (Chen and Ravallion 2000; Dollar and Kraay 2000).

The income poverty paradigm postulates that income captures aspects of material well-being, and that the market is a “guarantor” of the pursuit of social optimality (Easterly 2002). Quality-of-life refers, from this perspective, to choices that have to be made about how to allocate scarce societal resources in pursuit of this goal (Perry et al. 2006). The degree to which income matters in people’s lives does not seem clear, however. Veenhoven (2003) found a strong, within-nation correlation between income and well-being in poor countries. The “Latin American effect,” on the other hand, suggests that there might be some diminishing returns linking income with quality-of-life after exceeding some subsistence level. Thus, the majority of Latin American countries are only slightly below the subjective well-being (SWB) reported in Western Europe and North America despite considerably lower GNP per capita.

Another example is the extent to which the poor transform income in the purchase of more calories. This is investigated in “Economic Lives of the Poor” by Banerjee and Duflo (2007). They point out that patterns of what poor people spend on material goods vary widely in Latin America. Even as “poor people” has conventionally been defined as not having enough to eat, the additional penny that they earn does not convert automatically into purchasing of more food. As Banerjee and Duflo (2007) put it:

Yet the average person living at under \$1 per day does not seem to put every penny into buying more calories. Among our thirteen countries, food typically represents from 56 to 78 percent of consumption among rural households, and 56 to 74 percent in urban areas. For the rural poor in Mexico, slightly less than half the budget (49.6 percent) is allocated to food. (p. 145)

Another critique to the income poverty paradigm is the role of the market in pursuit of social optimality. The inefficiency of price systems and the presence of heavy social interactions are two of the main causes for market failure which drastically limits the scope of two of the most fundamental theorems of the economy of well-being, i.e., equity and “fair” distribution of resources. Mak (2004), for example, argued to distinguish the notion of efficiency from equity: An action that might improve everyone’s well-being may enhance some people’s welfare more than others. If those who benefited from this efficiency are the richest, then improved efficiency might be entirely consistent with more inequality. This would be unacceptable in light of the persisting poverty in the world.

In conclusion, the main goal of the income poverty paradigm seems clear, i.e., the reduction of individuals under the poverty line as quickly as possible in terms of income. The key strategy is to promote economic growth as a means to promote well-being because economic growth expands the individual command over goods and services (increasing personal incomes) – food, health care, medical services, basic education, and so on (trickle-down effect) (Chen et al. 1993).

The QOL or Subjective Well-being Paradigm

The conceptualization and operationalization of poverty on income or consumption has been challenged by those who favor broader criteria for poverty and its avoidance. For example,

Atkinson and Bourguignon (1999) advocated including social participation next to possession of commodities in their conception of well-being. They suggested that "... a poverty line can be thought of as comprising two elements: the expenditure necessary to buy a minimum level of nutrition and other basic necessities and a further amount that varies from country to country, reflecting the cost of participating in the everyday life of society."

The QOL paradigm rejects the notion that income can fully capture the meaning of human well-being, because income influences well-being only in an indirect way (Ruta et al. 2007; Sen 1985). People are assumed to derive utility from income and consumption. Well-being should be evaluated by being more directly linked to what matters most to the good life. In other words, QOL is concerned with understanding people's perceived satisfaction with the circumstances in which they live, thereby stressing the value of things other than income and productivity (Ruta et al. 2007). One prominent strand of thoughts in the QOL debate is the subjective well-being (SWB).

The SWB departs from the concept of utility to determine happiness, and claims that people are the best judges of their own conditions. Poverty, therefore, can only be assessed through the lenses of perceived welfare, thereby implying that welfare should be self-reported. SWB reduces well-being to the single concept of happiness. Diener (1984) asserts that happiness consists of three separate aspects: (1) life satisfaction, (2) the presence of positive feelings, and (3) the absence of negative feelings. Enhancing life satisfaction is considered to improve quality-of-life of the people. In assessing the link of SWB, survey instruments typically involve questions probing happiness or life satisfaction, and the individual's reaction to life events. The strength of this approach is its simplicity: It covers diversity of people by requiring the people to be their own judges. The most prominent measurement is the Gallup World Poll which is a survey fielded in around 140 countries and assesses people's experiences and well-being.

This perspective probes the happiness-income relationship and claims that differences in income explain only a small proportion of the variation in happiness among people. The literature makes a distinction between the relevance of absolute income and relative income on happiness. While the literature has found that absolute income matters only below a certain threshold among individuals (i.e., below a certain income level, an increase in income correlates with an increase in happiness), above that threshold only relative income matters for happiness. In other words, the happiness-income link seems contextual in nature, because people seem to compare themselves to others and to past experience, and they feel deprived if they are doing less well than others with whom they compared themselves (Easterlin 2001).

The literature is inconclusive on this very important matter because these conclusions could have far-reaching social policy implications. For example, if absolute poverty does matter little in happiness enhancement, then a policy geared toward economic growth would be of little consequence for poor people. This means that economic growth should not be the primary goal of government in the effort of poverty reduction. The main challenge is, however, that there are only a few studies explicitly linking subjective well-being with poverty. For example, Pradhan and Ravallion (2000) use surveys for Jamaica and Nepal to construct "subjective poverty lines" and compare these with objective poverty lines. They observed interesting differences such as a greater subjective than objective urban-rural difference in poverty, and greater perceived than actual household scale economies in consumption.

The Capability Approach

Sen (1984) contested that happiness could not adequately reflect human well-being and deprivation. Perceptions of well-being could be the subject of adaptive preferences. He points out that "the underdog learns to bear the burden so well that he or she overlooks the burden itself.

Discontent is replaced by acceptance...suffering and anger by cheerful endurance. As people learn to adjust...the horrors look less terrible in the metric of utilities” (308–309). He proposed, instead, conceptualizing and measuring quality-of-life beyond the notion of resources and income based on the notions of functioning and capabilities.

Sen (1985) also disputed the notion that human well-being and deprivation could be reduced to the possession of resources. He argues that individuals vary in their ability to convert resources into well-being thereby rendering the possession of resources as a poor indicator of well-being. Instead, he proposes that the concept of well-being should shift from resources (inputs) to achievements (outputs). Achievements assessed as being healthy, being literate, and expecting a long life (life expectancy) should be used instead of happiness or opulence. Achievements, or what he terms “functionings,” depend on an individual’s potential or “capabilities” to choose among available options. Therefore, well-being and poverty (or the lack thereof) are a result of the freedom that an individual possesses to achieve conditions in life (to eat, to read, to move, etc.), given his subjective characteristics and endowment of commodities (Sen 1999). The notions of functioning and capability seem interconnected. For example, functionings, such as health and education, may also determine capabilities (to consume, to move, to work, or to vacation).

The “freedom and capabilities” approach considers the individual as an end in itself rather than merely a means to economic activity. While this approach considers that a low income could be an indicator of poverty, the target for income is not an end in itself. Rather, it is a means to achieving functionings. Individual welfare, according to this perspective, increases when people, for example, are able to read, eat, and vote. Reading is deemed important not only because of the utility it yields, but because of the sort of person that one becomes as a consequence of the reading experience. The focus therefore shifted from goods to people, and what matters most for well-being is equality of opportunity, and not conditions.

The capability approach emphasized the multidimensional character of poverty. This multidimensional character was captured by the definition provided by the IMF/IDA in 1999:

Poverty means a lack of basic capacity to participate effectively in society. It means not having enough to feed and clothe a family, not having a clinic or school to go to; not having the land on which to grow one’s food, or a job to earn one’s living, not having access to credit. It means insecurity, powerlessness and exclusion of individuals, households and communities.

This approach implies a social policy that expands valuable capabilities through the promotion of freedom, while simultaneously promoting that individuals should have access to opportunities that enable them to pursue that which they chose to pursue. It begs the question as to whether public or private capital should create the conditions. Proponents of the capability approach tend to favor the supply of public services relative to expanding private incomes (as instruments of public action), while proponents of the income poverty approach stress economic growth.

The main contribution of the capability approach is that it expands the conventional economic view from a given state of affairs as may rationally depend not merely on an alternative utilization chosen but on the range of alternatives available to the individual, including those declined. One of the main consequences of the capability approach is the “human development index,” launched by UNDP in 1990. The basic premise of this report is the enlargement of choices and opportunities to enhance the quality-of-life.

Figure 6.1 reflects the debate about the meaning of poverty as it shifted from an early conceptualization based on a “goods-centered” view to a “people-centered” focus. This shift in focus has significant implications regarding the questions posed in assessing poverty and its corresponding metric. For example, early conceptualization would assess reading and writing by asking: How much money is allocated to primary education? Later conceptualization would ask: Can people read or write? Another early question might have been: What is the output of foodstuffs? The later conceptualization would be: How many people are undernourished? Figure 6.2 below presents this significant shift in perspective.

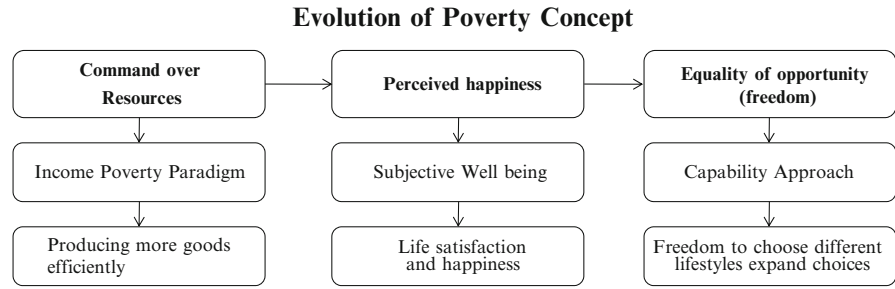


Fig. 6.1 Depicts the evolution of the meaning of the concept of poverty stemming from the debate among the three approaches

Meaning and Measurement of Poverty			
Paradigm	<u>Income poverty</u>	<u>Subjective well being</u>	<u>Capability</u>
Concept	Utility and opulence	Utility	Freedom (equality of opportunity)
Evaluative Criteria	Income and consumption command over resources	Life satisfaction and happiness	Longevity, literacy and health
Metric	e.g. Poverty line, Gini coefficient, Income short-fall	e.g. Self reporting subjective assessment	e.g. Indicators of human development
Policy applications	Maximizing economic growth	Economic growth not important	Economic growth necessary but not sufficient

Fig. 6.2 Reflects the differences in concepts, evaluative criterion, and metric and policy implications among the three approaches

Tourism and Poverty Relief: The Debate

How has the debate in the general literature been reflected in the tourism literature? There appears to be a dearth in the tourism literature pertaining to the relationship between tourism development and poverty relief concerning the three strands of the general literature discussed previously. Tourism studies in general have addressed issues related to tourism development and economic growth, on the one hand, and travelers’ well-being on the other hand. While tourism studies have recognized that “those who are underprivileged and in developing countries have looked upon tourism as an opportunity to break out of their cycles of poverty and enjoy a better life” (Chon 1999, p. 135), studies have assumed that gainful growth somehow would trickle down to the poor in terms of job availability and through the windfall of local economic development that may result from spending in the destination.

Traditionally, tourism has been measured through macroeconomic terms with specific reference to arrivals, jobs created, and foreign exchange earnings. Tourism satellite accounts and multipliers have been used to capture the economic benefits accrued from tourism development and to marshal support for tourism development (Archer 1973; Zhou et al. 1997; Mihalic 2002; Mak 2004; Vanhove 2005). However, tourism satellite accounts and multipliers are of little relevance to a realistic measurement of the impact of tourism development on poverty reduction.

Founded on the income poverty perspective, most studies were concerned about the relationship of tourism development and economic growth with a focus on the effects on the society in general.

Some studies are country-specific, such as Ghali (1976) in Hawaii; Hazari and Sgro (1995); Balaguer and Cantavella-Jorda (2002) in Spain; Durbarry (2004) in Mauritius; Dritsakis (2004) in Greece; Narayan (2004) in Fiji; and Croes and Vanegas (2008) in Nicaragua. Some assessed multiple countries such as Brau et al. (2007) and Sequeira and Nunes (2008). They all found a positive relation between tourism expansion and economic growth. Others found that tourism is not conducive to economic growth, e.g., Hazari et al. (2003), Eugenio-Martin et al. (2004), Oh (2005), Nowak and Sahli (2007), and Capo et al. (2007).

Among the few studies that specifically addressed the relationship between tourism growth and poverty reduction is Croes and Vanegas (2008). This study departs from an income poverty paradigm perspective and assessed empirically the relationship between poverty reduction and tourism growth in the case of Nicaragua. Croes and Vanegas (2008) applied a vector autoregressive (VAR) approach in assessing the role of tourism in poverty reduction in Nicaragua, and found that tourism has a significant effect on poverty reduction. Blake et al. (2008) used a computable general equilibrium (CGE) model to assess the contribution of tourism on poverty reduction in Brazil. They found that tourism benefits the lowest income households albeit to a lesser extent than higher income groups. Mbaiwa (2005) found that while tourism increased in the Okavango region in Botswana, poverty also increased, thereby concluding that tourism is not sustainable in reducing poverty.

While the search of the economic growth-tourism expansion continued, a new stream of research sought to assess the impact of tourism growth on the well-being of the individual. Initially, this stream was more focused on how the individual viewed the effect of tourism growth on society at large (i.e., social and cultural impacts). Eventually, this focus evolved into concerns regarding the psychological well-being of the individual, both as a traveler and as a host. According to Neal et al. (1999), psychological well-being is impacted by the nature of the traveling event itself. That is, traveling requires a comprehensive preparation, including defining the motivation, selecting the destination, ensuring expenditures, and organizing, all of which are perceived as stimulating and satisfying activities. Achievement at each of these stages produces a contented happiness the sum of which could contribute to life satisfaction. This stream of research has been influenced by Veenhoven's hypothesis that happiness is the reflection of life satisfaction. Therefore, in these studies, life satisfaction is used as a proxy for quality-of-life.

These studies have addressed issues related to the ability of travel and tourism to both enhance and diminish the QOL of local residents in both the host community and travelers. For example, Cohen (2001), Linton (1987), Neal et al. (1999, 2004), Perdue et al. (1999), Kim (2002), Gilbert and Abdullah (2002), Andereck et al. (2007), Cecil et al. (2008), Liburd and Derksen (2009), Moscardo (2009), and Benckendorff et al. (2009) focused on how tourism influences and impacts an individual's overall life satisfaction and found a positive relationship between the two variables. Michalko et al. (2009) found in the Hungarian context that tourism mobility is seen to contribute to life satisfaction as travelers seem happier than non-travelers, echoing a similar assertion of Richards (1999) with regard to American travelers.

The application of the SWB paradigm in the poverty reduction-tourism development debate has been thus far lacking in the tourism literature. The studies conducted from the SWB perspective are more concerned with the general traveler's well-being than with the well-being of the poor, and have been applied to developed countries. This hampers the potential of the SWB approach to better understand and evaluate the relationship between well-being and travel as it impacts the poor.

The tourism literature seems completely lacking in the application of the capabilities approach. For example, Hashimoto (2002), in discussing indices measuring social and economic development, refers only superficially to Sen's theoretical foundations to define quality-of-life. The UNDP Human Development Index, which is based on the capability approach, is discussed briefly as one of the categories of indices that attempt to measure the concept of quality-of-life.

Cracolici and Nijkamp (2008) in their study about attractiveness and competitiveness of tourist destinations only mention in passing the capabilities approach by linking the concept of individual's well-being to Sen's capabilities.

Can Tourism Work for the Poor?

Despite decades of efforts in aids, grants, loans, programs, projects, and structural adjustments to reduce poverty globally (Hawkins and Mann 2007), results have been limited at best. Poverty continues to be in rife in the world. The poor seem "trapped" in a vicious circle without hope of overcoming their depriving situation. This circumstance prompted the international community to respond to this abysmal condition with a summit in September 2000 in New York. The Millennium Development Goals (MDGs) from September 2000 are the result of that summit. They include reducing the number of persons under the one-dollar-a-day poverty line by half by 2015. The general goals are elaborated at <http://www.developmentgoals.org>.

The MDGs define its targets not in terms of income, but specifically in terms of poverty. For example, by 2015 the goals aim to reduce by half the number of people who live on less than one dollar per day. Whether tourism development can specifically benefit poor people in developing countries in the context of the MDGs is difficult to address directly because the basic data are absent. It is known, however, that the most important pro-poor impact of tourism results from the enhanced opportunity to generate mass employment and from the creation of the opportunity to allow the most vulnerable groups of a society to participate in the production of tourism goods and services.

While tourism appears poised to address the needs of the poor (Ashley et al. 2001; Encontre 2001; Yunis 2004), it does not seem to provide relief to the poor automatically. This stated, the World Tourism Organization (WTO) launched the Sustainable Tourism Elimination of Poverty (STEP) program to focus specifically on tourism as a means to reduce poverty. This program is a result of the pro-poor approach that began at the end of the late nineties. Pro-poor is not about growth itself but about redistributing the benefits of tourism development to favor the poor. It focuses on the industry to change its practices in support of increased accessibility of the poor to the economic benefits that tourism development reaps (e.g., training, employment, and supply linkages).

The research contribution of the pro-poor approach seems to aim at enhancing the understanding of the practical partnership between local residents and tourism operators in order to maximize benefits to the poor. For example, several studies focused on describing pro-poor projects in Indonesia (Ashley and Roe 1998), India (Goodwin 1998), Nepal (Saville 2001), the Caribbean region (Meyer 2006), The Gambia (Bah and Goodwin 2003), southern Africa (Ashley and Roe 2002), and small island destinations (Scheyvens and Momsen 2008). These cases focused on partnerships with the private sector, communities, and community-based tourism enterprises, and showed how companies and local communities might benefit when such partnerships are developed.

Van der Duim and Caalders (2008), on the other hand, found only modest results in applying the pro-poor premises to a pilot project in Costa Rica. They linked 24 small-scale tourism projects to tour operators in Costa Rica and the Netherlands. The study aimed at understanding how supply linkages that would benefit poor people in Costa Rica could be generated. They found that only one of the 24 projects under review was eventually carried over in the tourism chain, thereby indicating very modest results in the pro-poor approach. Other studies focus on the link of agriculture and tourism development, the link of textiles and tourism development, and how this link can benefit poor people (Shah and Gupta 2000; Cohen 2001; Torres and Momsen 2004).

The main criticism of the pro-poor approach is that it does not allow for the understanding of how tourism can contribute to reduce poverty because it only focuses on specific areas, cases, or communities within a destination (Briedenhann and Wickens 2004). Goodwin (2005), for example, indicates that there have been very few attempts to measure the beneficiary impacts of tourism on poverty reduction. He asserts that there is a lack of consistent and reliable documentation about the effects and argues that the pro-poor approach should entertain robust indicators and methodologies to measure the net benefits of tourism to the poor, if the approach is serious in enhancing the understanding of the mechanisms of how tourism can help mitigate poverty. Harrison (2008) asserts that there has not been a clear link between pro-poor projects and poverty reduction.

Pro-poor research and practice seem to have deflected attention away from the real question of how tourism does alleviate poverty. If the definition of pro-poor growth means that growth leads to significant reductions in poverty, as is purported by the OECD (2001) and United Nations (2000), it begs the question of what exactly is defined as a significant reduction in poverty. For example, should the growth rate of the income of the poor be greater than the average income growth? Or, should we only consider reduction of poverty induced by growth while leaving income inequality constant? In other words, how much must the poor benefit for growth to be considered pro-poor?

There seem to be two strands of connotation regarding pro-poor tourism, i.e., (1) as the capacity for tourism to generate net benefits for the poor (Ashley et al. 2001) and (2) as the capacity for tourism to provide more benefits to the poor than the non-poor (Schilcher 2007). The first strand seems to relate to income as reducing poverty thereby considers tourism as pro-poor when income growth reduces poverty regardless of its effects on inequality. The second strand seems to be related to inequality reducing growth. In other words, the policy outcome should be that the growth rate of the income of the poor should be higher than the average growth rate.

The pro-poor tourism literature as discussed, for example by Hall (2007), does not provide sufficient analytical and operational content to the concept of pro-poor and its relationship with tourism. Whether there is a link between tourism and poverty reduction is empirical in nature and should be addressed as such. In the next section, two questions will be considered: (1) Does tourism growth reduce poverty? and (2) does tourism growth increase equity in a destination? The first question will apply the income poverty approach and the capability approach, while the second question will address the distributional potential of tourism.

Tourism Development on Poverty Reduction

Tourism has been an important component of the economic development strategies of developing countries since the 1960s. International organizations have identified tourism as an engine of growth to assist poor countries in reducing poverty (WTO 2002; Hawkins and Mann 2007). The WTO (2002), for example, alleges that tourism, with the requisite of travel to a destination, is a sector inductive to poverty reduction. A part of the reduction may be due to tourists purchasing country-specific commodities that are bought and consumed locally, thereby providing opportunities for the selling of additional goods and services.

When tourism is used as a growth engine to assist in poverty reduction, there may be several advantages over other forms of economic stimuli. This is because the tourist consumes a bundle of services and goods from more than one supplier, spanning the hospitality, the agricultural, and the manufacturing and services sectors – including food and beverages, furniture and textiles, jewelry and cosmetics, and transportation and communication services, among others. Thus, many different service suppliers participate in creating a tourism experience. This could create the

opportunity for poor, marginal, and remote areas to benefit from the advantages (i.e., increased employment opportunities, higher income levels, and a trickle-down effect) that tourism spending may bring to a destination.

Over the last three decades, tourism receipts have grown from USD 160 billion to USD 946 in 2008 – or USD 2.6 billion per day (WTO 2010). Tourism has been growing faster in developing countries than elsewhere; tourism's share in the economies of developing countries has increased, where tourism receipts have grown at average growth rates of 11% a year over the past two decades (Lejarraja and Walkenhorst 2007); and many countries that are engaged with tourism are among the poorest and least-developed countries. For example, of the 78 low-income countries (per capita GDP of less than USD 760), 56 designed a poverty reduction strategy. Forty-five of the 56 groups identified tourism as a major catalyst of poverty reduction (Hawkins and Mann 2007). It appears that considerable resources are allocated to tourism to harness the benefits that tourism could bring.

The magnitude of income elasticity of tourism seems to benefit developing countries. Algieri (2006), for example, asserts that each increase of world GDP of 1% will be accompanied by a rise of tourism revenues of about 5.8%. The World Tourism Organization (2002) has estimated that developing countries will receive five times as many tourists as more mature markets in Europe and North America. The increasing affluence and the expansion of the global middle class therefore seem to positively impact demand in developing countries.

Research shows that revenues from tourism are stable and are two to five times more reliable as a source of revenues than the sale of goods such as agricultural and mineral commodities (Maloney and Montes Rojas 2005). Recent studies from, for example, Vanegas and Croes (2007) indicate similar findings. Mihalic (2002) cited two specific advantages of tourism compared with the export of goods and services: (1) natural, cultural, and social attractiveness, which normally cannot be exchanged, and thus can be valorized, and thus may be fixed at a premium through tourism, and (2) products produced locally, which can command a higher price sold locally to tourists than when exported and have lower costs because of no or lower transportation or insurance costs.

The World Travel and Tourism Council (WTTC) forecasts an average growth rate of 4.4% for the tourism industry between 2009 and 2018, representing 10.5% of the global gross domestic product and supporting 297 million jobs (WTTC 2009). A significant amount of this growth will accrue to developing countries (UNWTO 2008). For example, the proportion of international tourism receipts accruing to developing countries amounted to 25% of the total global international receipts in 2005. Tourism has become the principal export of a third of all developing countries and the main source of foreign exchange earnings of 49 of the least-developed countries (Vanegas and Croes 2007).

Yet, Sinclair (1998), Hall (2007), Scheyvens and Momsen (2008) and other researchers claim that in some countries where tourism generates foreign exchange, tourism receipts did not reduce poverty, but in some cases seem to have entrenched inequality. For example, in the Caribbean region, poverty trajectories have varied in different countries despite engaging in tourism. In the case of the Dominican Republic, extreme poverty levels have been substantially reduced in the past 25 years. The Dominican Republic decreased its population falling under the one-dollar-a-day from 13% in 1981 to less than 2% in 2001, despite its population growth. In contrast, Haiti has remained the poorest country in the Western Hemisphere with indications that the situation has worsened in the past 5 years.

It may be that leakages through imports were significant in these countries, thereby offsetting potential tourism benefits. Table 6.1 indicates the level of importance of tourism receipts in the economy and the poverty headcounts (percentage of population under a dollar-per-day) in selected countries. The possibilities for tourism to reduce global poverty depend on the extent to which least-developed countries are engaged in tourism development. Tourism plays a very small

Table 6.1 Poverty and tourism ratios in selected developing countries

	Poverty headcounts (\$1 a day)	Tourism receipts as % exports	Tourism receipts as % GDP	Year poverty data
<i>Africa^a</i>				
Burkina Faso	56.54	9.6	0.9	2003
Ethiopia	39.04	24.5	4.3	2005
Madagascar	67.83	8.6	1.4	2005
Malawi	73.86	9.4	2.5	2004
Mali	51.43	10.1	3.1	2006
Uganda	51.53	25.8	3.5	2005
United Rep. of Tanzania	88.52	28.1	4.5	2000
Zambia	64.29	11.2	3.4	2004
<i>Latin America^b</i>				
Haiti	54.9	14	20.2	2001
Nicaragua	45.6	11.9	3.8	2005
Bolivia	19.62	9.4	2.2	2005
El Salvador	20.44	12.9	3.5	2006
Guatemala	17.9	12	2.6	2006
Honduras	22	8	4.9	2005
Paraguay	16.37	2.8	1.3	2002
Peru	15	8	1.6	2004
Costa Rica ^c	2.37	16.9	7.3	2007
Dominican Republic ^c	3.96	34	17.1	2007
<i>Others^d</i>				
Bangladesh	50	0.7	0.1	2005
Lao	50	1	5.9	2005
Nepal	55.27	21.8	4	2004

Source: World Development Indicators from the World Bank (2010)

Notes:

^aThe table includes countries with a poverty headcount of greater than 20% and with data availability from 2000 to the present

^bCountries included are those with a poverty headcount greater than 10% and data availability from 2000 to the present

^cThese two countries are included as a matter of comparison

^dCountries included are those with a headcount of 20% or more and data availability from 2000 to the present

role in their economy measured as a proportion of GDP. For example, Nicaragua has a somewhat lower level of tourism earnings relative to GDP than Honduras, about the same as El Salvador, and half of the proportion of Costa Rica. Tourism plays an important role in Costa Rica and the Dominican Republic, two successful countries in overcoming poverty challenges.

The key challenge appears to be, then, how to ensure that the benefits of tourism development accrue to the poor. This statement is an empirical question. Based on the previous analysis, the focus of the study turns to empirically investigate this question.

An Empirical Assessment of the Income Poverty Approach

Croes and Vanegas (2008) investigated the question regarding the effects of tourism expansion and tourism reduction in the case of Nicaragua. The study used a VAR model to examine the direct nexus between tourism development and poverty. The hypothesis that tourism expansion

or tourism reduction led to poverty increase or reduction was accepted based on the statistical test to find causation of tourism development to poverty reduction.

The results denote that a 1% increase of international tourism receipts would produce a 0.51% decrease in the poverty headcount index of Nicaragua (the coefficient is -0.507 and significant at the 5% level). The study also found the existence of a one-way causality in the Granger sense for tourism development – leading to poverty reduction in the Nicaraguan economy. Tourism development, therefore, leads to poverty reduction in the case of Nicaragua.

The implication is that, for Nicaragua with a headcount index of 45.6% in 2004, there exists a 95% confidence that the index will fall by 2.28% points on average over time. Nicaragua's growth in international tourism receipts displayed a 4.8% real growth annually between 2000 and 2008, which means that the headcount index, based on this same average, could fall by 2.5% points.

The study of Croes and Vanegas (2008) provides a cogent method to assess the empirical relationship between poverty reduction and tourism expansion. However, it does not deepen the understanding of how quick tourism expansion may affect poverty reduction. To gain insights into the short-term adjustment trajectory of countries, the study conducted an error correction regression, investigating Nicaragua and Costa Rica. Error correction models (ECM) represent a powerful means of modeling economic time series. These models aim at constructing well-specified statistical models, which separate the long- and short-run dynamics so that problems with nonstationarity are without effect.

The ECM was applied in the case of Nicaragua, and the direct effects of tourism receipts on poverty reduction were revealed to be significant at the 1% level. The value had the correct sign (negative) with a coefficient of 0.84 and $t=4.25$. The coefficient turned out to be larger than in the case of the VAR model referred to previously. The adjustment coefficient suggests a significant dilution effect of 0.55 at the 1% significance level. This implies that, for Nicaragua with a headcount index of 45.6% in 2004, there is a 99% confidence that the index will fall by almost 1.25% points in the first year.

The ECM was also applied to the case of Costa Rica. The value of the coefficient turned out to be very small, namely -0.00085 , has the correct sign, but is statistically insignificant with a $t=0.38$. This implies that tourism expansion does not seem to have any incidence in extreme poverty relief in that country. This pattern is different from Nicaragua where the short-term effects of tourism on poverty reduction show a similar pattern to the short-term impact regarding tourism and economic expansion, namely, that both quickly convert to equilibrium. However, the results did not confirm a Granger causality effect linking tourism to poverty reduction in the case of Costa Rica.

That is, while tourism seems to have a significant direct impact on poverty alleviation in the case of Nicaragua, tourism's direct role in poverty relief in Costa Rica is more ambiguous. Tourism seems to only play an indirect role in poverty reduction for Costa Rica. Tourism possibilities to reduce poverty appear, therefore, contingent on the level of economic development of a country. Aggregate income as captured by tourism receipts does not seem to matter with regard to capability expansion beyond some point.

The implication is that the effects of tourism on poverty reduction seem different, depending on the country's level of income. For a low-income-level country, the direct effects seem substantial and significant. For a medium-income-level country, tourism expansion seems less important as a strategy for poverty relief. For Costa Rica, the issue of extreme poverty fell to a low level, and it appears unlikely to fall much further because there seems to be a lower threshold limit to the impact of tourism expansion to extreme poverty relief. Rather, tourism expansion in this case could be construed as fundamentally necessary to continue fostering the basic capabilities and human development as referred by Sen (1999).

An Empirical Assessment of the Capability Approach

The study also explores the empirical relationship between tourism receipts and the human development index (HDI). The HDI is a composite measure of access to education, health, and income and is intended to capture the multidimensional nature of poverty. As before, our focus is Nicaragua and Costa Rica. The logarithm of the real international tourism receipts of the two countries (2000=100) was used, and the HDI published by the UNDP for both countries as reported from 1990 to 2008. Again, an ECM was applied to assess the empirical relationship between these two variables.

The results suggest clear differences between Nicaragua and Costa Rica. In the case of Nicaragua, the change in tourism has a positive effect on human development: A 1% increase in real international tourism receipts impacts the HDI by 0.27% points over time (SE is 0.0623 and $t=4.32$) at the 5% significance level. Causality between the two variables was also tested by applying a Granger test. The results indicate that there is a link from tourism expansion to human development.

In the case of Costa Rica, the results indicate that there is a negative relationship between tourism development and the HDI, albeit the relationship turned out not to be significant. The value of the coefficient is -0.0108 (SE 0.0615 and $t=-0.18$). The direction of causality between the human development and tourism development runs in the opposite direction compared to that of Nicaragua. This result suggests that human development seems essential for tourism growth, but tourism expansion appears not to be contingent upon human development.

The Distributional Effect of Tourism

The last question that this chapter will address is whether tourism could reduce income inequality. Poverty relief has rarely been investigated in the context of the distributional effects that tourism may have on enhancing and/or changing the income of the poor. Inequality in income can lead to higher poverty headcounts. Earlier in the chapter, we referred to the study of Blake et al. (2008) as one of the few studies addressing tourism's impact on poverty relief via reduction of income inequality. The study applied a computable general equilibrium model of the Brazilian economy to assess the distributional effects of tourism. The study found that, while the effects of tourism on all income groups are positive, the lowest income households benefit less than some higher income groups. Prices, earnings, and government appear as relevant determinants of this outcome.

About the same time of the publication of the Blake et al. (2008) study, Rivera et al. (2007) conducted their Nicaraguan study. In this study, a shock of USD 10 million or its equivalence in local currency to assess the impact of tourism on the national economy was considered. The same shock of NC \$163.7 million to four specific economic sectors in Nicaragua was applied. By individually applying the same shock in final demand to each sector, we were able to calculate the indirect income, the distribution of income to the labor force, direct and indirect jobs, and the ability of tourism to reduce unemployment. The study applied input-output and social accounting matrix (SAM) multiplier methods.

The Rivera et al. (2007) study found that tourism outperforms agriculture, manufacturing, and construction in almost every economic category. For example, the total economic impact of tourism, measured by direct and indirect income, surpasses agriculture, manufacturing, and construction by 31%, 28%, and 12%, respectively. So, it is safe to say that the spending characteristic of the visitors that come to Nicaragua positively engages many other sectors, thereby yielding a higher interindustry impact on the economy.

The study divided the labor force into four income groups, and it was found that tourism provides higher incomes for all income groups, thus confirming the finding of Blake et al. (2008). The agriculture sector is, however, the only sector that provides similar increase in income to the relatively poor income groups (those with NC \$10,000 or less). Unlike Blake et al. (2008), the Rivera et al. (2007) findings reveal that tourism provides between 50% and 77% more income to those that earn NC \$5,000 or less. In other words, the lowest income households benefit more than some higher income groups.

Conclusion

In recent times, the face of the poor has mesmerized the world to the extent that the United Nations prefaced the millennium goals ambitiously targeting the numbers of poor in the world and reducing them by half. This brought poverty back to the forefront of the tourism development debate. The conceptualization of poverty has widened over time. Its meaning has evolved from the possession of resources to consideration for the range of opportunities available from which individuals may choose (freedom) in order to construct the type of foundation that could empower them to participate in a good quality-of-life.

The poverty income portends to capture the good life through some aggregate metrics of economic growth, but a growing choir of studies has contested that these metrics are ill-equipped to say anything more about the people who are said to benefit, or suffer, from changes in the broader economy. The introduction of the human development index embraced the multidimensional nature of poverty, and embraced the broader concept of poverty to include a lack of opportunities to live the life that one chooses. The tourism literature has been lacking in directly addressing the issue of poverty. The pro-poor literature has attacked the untenable situation of poverty and has identified practices that would provide greater access of the poor to the benefits accrued from tourism development. Yet, despite its good intention, pro-poor literature seems to have distracted the discussion about how tourism could provide relief to the poor. Only a handful of tourism studies attempted to address this empirical question.

The literature review suggests three important propositions that have been tested in this chapter: (1) Tourism expansion provides relief to the poor in terms of reducing the amount of poor people falling under a specified poverty line, (2) tourism expansion enhances human development, and (3) tourism expansion benefits the poor more than other income groups, thereby seizing the issue of income inequality. The results suggest that tourism could reduce the income inequality in the case of Nicaragua. If we combine this result with the previous results, i.e., that tourism reduces poverty only in the case of Nicaragua, then we can conclude that tourism is pro-poor both in reducing poverty as well as in reducing income inequality. On the other hand, the results seem ambiguous in the case of Costa Rica. Tourism development seems less propitious for the poor in Costa Rica, suggesting that Costa Rica would fall within the second category of the above propositions. In addition, while human development seems to be an outcome of tourism development in the case of Nicaragua (and not an input), in the case of Costa Rica its role is more dubious, suggesting that the relationship between tourism development and human development is not automatic.

Some interesting policy implications are revealed through the above results. For example, (1) tourism development explains poverty reduction, (2) poverty reduction up to a point (tourism flattens after some point-concave relationship), and (3) capabilities. The implication is that tourism development has the potential to tackle poverty reduction, inequality, and human development simultaneously, but the connection is not an automatic one. This connection seems to hide some significant clues as to the development trajectories of countries, not only by comparing

growth paths among countries but also by uncovering changes over time within the same country. Uncovering the determinants of the interaction between tourism development, economic and growth, and human development, such as the role of institutions and investment priorities in social policies, could enhance our understanding of the potential of tourism development as a pro-poor development tool.

Further research in unraveling the tourism development, economic and growth, and human development nexus remains important in answering the question regarding tourism effects on poverty reduction and inequality. Expanding both on cross-country analysis and within-country assessment is crucial for enhancing our understanding regarding whether tourism development, economic growth, poverty, and inequality reduction move in tandem over the long run with evidence of their mutual interaction, or whether human development should be an antecedent for establishing the previous nexus.

In addition, it is important to establish the strength of the nexus combining tourism development and human development. Uncovering the strength of this nexus can increase our understanding in establishing the right balance between private incomes and public provisioning of social services. The proposition that incomes matter together with other things is not disputed in the literature and could be distilled from the empirical analysis discussed above. However, if there is a weak link between tourism growth and human development (capabilities), then it implies a policy of human development with less emphasis on private incomes. If, on the other hand, private incomes are an important tool for expanding capabilities, then a focus on income poverty could be justified from either perspective.

Unraveling this balance has a key policy implication: If poverty reduction and capacity expansion influence human development independent from tourism development, then capacity expansion requires a government intervention focusing not only on tourism but also on provisioning of social services. On the other hand, if tourism is growth enhancing and growth enhancing is poverty reduction and improving capabilities, then government intervention should only focus on tourism development. This determination is, however, an empirical question meriting further research regarding whether tourism is to play a role in uncovering real opportunities for the poor.

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Chapter 7

Tourism and Quality-of-Life: How Does Tourism Measure Up?

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Introduction

Tourism attracts academic attention as a phenomenon and by the sheer diversity of subject areas involved in its construction. Disciplines such as economics, marketing, anthropology, psychology, sociology, history, and geography have contributed to the development of a dynamic and productive field of research. Simultaneously, disciplines involved in tourism have profited from its empirical and analytical characteristics. The objective here is not to reignite the contestation over tourism's disciplinary status (cf. Hall et al. 2004; Tribe 1997, 2000) but to emphasize how tourism as an inherently interdisciplinary and multidisciplinary field draws on a wide variety of "primary" academic disciplines. This has led to constructive reflections upon tourism and related phenomena such as mobility, globalization, motivation, consumption, governance, identity, technology, social networks, sustainability, and only more recently, QOL.

Tourism is also a field which is greatly influenced by the context of local, national, and international tourism demand and supply, tourism industry structure, and consumer characteristics. Conceptualizing tourism as a global process of commoditization and consumption involving flows of people, capital, images, and cultures (Appadurai 1990; Clifford 1997; Meethan 2001), tourism may induce changes to places, people, and patterns of social and economic relationships, among others, through considerable and unequal redistribution of spending power. Prior to 2000, there were only a few of books and journal articles addressing the topic of quality-of-life in tourism (Jennings and Nickerson 2006) whereas the impacts of tourism have received much more attention. This chapter presents a select literature review that outlines the key findings and

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the linkages between the sociocultural environmental and economic dimensions of tourism as they relate to QOL. Most of the literature is prescriptive in nature, revealing the cultural, environmental, social, and economic effects of tourism in a given community, or area, subjected to tourism development.

Tourism Development and Quality-of-Life

During the 1950s and 1960s where issues of underdevelopment, elimination of poverty, and economic growth dominated the post-World War II agenda of the industrialized nations, tourism was embraced as an economic panacea. Tourism was believed to facilitate “economic take-off” (Rostow 1952) and generate development in the so-called Third World. Also encouraged by the World Bank, the International Monetary Fund, the United Nations Development Program (UNDP), and bilateral aid agencies, tourism was embraced as lucrative foreign exchange earner with a significant multiplier effect.

New development theories of modernization and underdevelopment were introduced alongside a new geopolitical imagery. Hereby, the world was neatly ordered in binary oppositional forms, namely the First and Third World, center and periphery, north and south, and developed and underdeveloped countries. Supported by modernization theory, development was visualized as a progressive movement toward more institutionalized complex forms of “modern” society, which could be facilitated by a series of economic and technological interventions. The benefits hereof, it was professed, would eventually “trickle down” via the middle class to the underdeveloped masses. Generally, little upfront investment was required by local authorities who, lured by tourism’s fascinating growth potentials and highly reproducible characteristics, provided lucrative incentives to foreign investors and multinational corporations to set up operation in their destination (Poon 1993; Patullo 1996).

Imparting changes in socioeconomic development practices, theories of dependency and neo-imperialism evolved during the 1960s and 1970s that were highly skeptical of modernization theory and capitalist penetration into the Third World. Dependency theorists, notably Frank (1967) argued that development was an unequal process through which wealthy First World nations, labeled “centers” or “cores,” got richer and the poor “peripheries” of the Third World even poorer.

Pioneering tourism researchers, notably Smith (1977), Cohen (1978), de Kadt (1979), and Britton (1982) in their seminal works argued that tourism – rather than benefiting peripheral destinations and contrary to popular belief – in many cases led to new forms of dependency and acculturation. Subscribing to the Marxist conceptual framework of capitalism as exploitative, dependency theory perceives underdevelopment as embedded in particular political structures. It points to the inherent expansionist nature of capitalism and the continuous need for new markets and increased capital accumulation. Pointing to parallels between service and servitude in neo-colonial contexts, the economic value of tourism was fundamentally questioned. A prevailing representation of tourism that has guided academic research since the 1970s appears to be one that emphasizes the impacts of tourism at the destination level (Smith 1977, 1989; Patullo 1996; Smith and Brent 2001; Archer et.al, 2005). Among the many epoch-marking works, Valene Smith’s *Hosts and Guests* (Smith 1977, 1989; Smith and Brent 2001) captured how tourism’s impacts and consequences cannot be prevented: “In the 1980s, individuals questioned whether tourism was a blessing or blight, but the issue is now essentially academic, given the value of tourism as the world’s largest industry and its role as a global employer and customer” (Smith 2001, p. 109).

Following Jafari's (1989) idea of academic platforms occupied by tourism researchers, the 1980s were characterized by a quest for knowledge about tourism's potential impacts – environmental, sociocultural, and economic – in tourist destinations around the world. Adopting a more cautionary stance toward tourism's costs and benefits, some researchers turned to the biological concept of carrying capacity to explain tourism's tendency to produce negative socio-cultural and environmental impacts (Miller and Twining-Ward 2005, p. 29–30). The idea of tourism's carrying capacity can be explained as the maximum number of people using a site without an unacceptable alteration of the physical environment and without an unacceptable decline in the quality of the experience gained by visitors (Mathieson and Wall 1982, p. 21). Another example of a cautionary approach is Butler's (Butler 1980) famous adaptation of Plog's (1974, p. 4) life-cycle model into the tourism area life cycle that demonstrates how “destinations carry within them the potential seeds of their own destruction.” If a destination's carrying capacity is exceeded, visitor attractiveness is consequently reduced which will lead to declining number of arrivals. Aiming for a deeper understanding of tourism's effects among residents at the destination level, other researchers have examined residents' positive and negative perceptions of tourism development in their communities (e.g., Mowforth and Munt 1998; Hsu 2000; Macleod and Carrier 2010).

Tourism, Culture, and Quality-of-Life

Two main trends of argument can be detected in the debate concerning the relationship between tourism and culture at global, national, and local levels. Based on a notion of culture as difference, the first argues that the notable consequences of tourism are increasing westernization and homogenization of culture. A more positive counterargument is that tourism leads to increasing differentiation of cultures and reassertion of cultural identities at the local level (Meethan 2001). The second trend is concerned with the commoditization of culture (Macleod 2006). Culture becomes a potentially quantifiable, measurable, and saleable product to be staged, marketed, sold, and consumed in the shape of objects, events, experiences, or in even broader terms as the journey itself (Ek and Hultman 2007). An inherent angst for culture change can be detected in both trends attempting to explain the mechanisms and processes of culture contact.

Concerned with tourism's homogenization and westernization effects, many of the early tourism studies were informed by acculturation theory. The process of acculturation has been defined as “culture change that is initiated by conjunction of two or more cultural systems” (Nash 1994, p. 184). Change is interpreted as a result of external factors, here tourism, imposing on an authentic, much weaker sociocultural system (McKean 1976). Similar to billiard balls colliding and reacting, the impact caused by tourism on the local culture includes a “process of borrowing” through which the cultures become “somewhat like the other” (Nunez 1989, p. 266). While tourists were seen as less likely to borrow from their hosts (Nunez 1962; Nettleford 1975; Patullo 1996), local residents are likely to abandon traditional culture and values as they become part of a holiday culture (Matthews 1978) after which a sense of alienation is likely to be felt. The effect has also been described in the rather clumsy terms “cocacolaization” and “McDonaldization” of the native way of life (Nunez 1989; Meethan 2001; Smith 2001) to further argue that despite the appearance of difference, the more globalized and standardized it is.

The commercialization of artistic practice through which cultural artifacts and practices become goods evaluated primarily in terms of their monetary exchange value on a tourist-oriented market have also attracted attention (Nettleford 1975; Evans-Pritchard 1989; Meethan 2001). Often attached to the commercialization of culture for tourist consumption is a notion of loss of authenticity (MacCannell 1999) and lacking local control (Patullo 1996; Poon 1989).

One of the early tourism studies (Nunez 1962) examined the phenomenon of weekend tourism in a Mexican highland village. Changes in the traditional *machismo* syndrome or “cult of masculinity” symbolized by the horse, the pistol, and skill in their use were negatively impacted. Due to the intervention by the state, the often bloody practices were prohibited alongside horse racing, stray dogs, urinating in the streets, public drunkenness, and wearing of traditional white cotton trousers, *calzones*. Redefined as underwear, new measures were introduced without community consultation to make it “safer and more suitable” for tourists. McKean’s (1976, 1989) studies in Bali illustrate a similar account of state intervention attributable to tourism. Authorizing “certificates of art,” the Indonesian government sought to guarantee and control the authenticity of a product to potential buyers, i.e., the tourists. McKean argued that tourism has “strengthened the ‘folk,’ ‘ethnic,’ or ‘local’ survival for Balinese,” and some social units have “gained greater cohesion while simultaneously profiting from the tourism industry” (McKean 1976, p. 98).

Tourist patterns of behavior are commonly described as very different from the residents’ and, at times, from those displayed in the tourists’ residual culture (Carr 2002). Inhibitions are shed, and problems, such as prostitution, drugs, alcohol, gambling, and crime, may ensue (Archer et al. 2005) as they are attributed to the tourism’s “demonstration effect” (Brunet et al. 2001). Focusing on tourism’s reconfiguration of kinship structures and language, Nettleford (1975) and Patullo (1996) argue that the predominant practice of extended family households became inferior to the “new” ideal of the nuclear family and a negligence of Creole toward favoritism of Queen’s English in the Caribbean.

Associated with the reassertion of local, cultural identity through tourism development (e.g. Smith 1979, 1989), positive evaluations of tourism’s sociocultural impact are also noticeable. Boissevain’s (1977) study of tourism in Malta, then a newly independent island after four centuries of foreign rule, describes how “the tourist demand for folk music has unquestionably helped preserve the limited instrumental and vocal music that existed” (Boissevain 1977, p. 282). Furthermore, Boissevain explains how “tourism has obliged the Maltese to formulate more clearly what they stand for – to think more consistently about their own culture instead of taking it for granted or imitating foreign tastes” (Boissevain 1977, p. 277). The relationship between satisfying tourists’ consumption and asserting local status and identity has stimulated research interest, particularly in the visual component. MacCannell’s (1999) formulation of “sightseeing as a ritual performed to the differentiations of society,” later developed by Urry’s (1990) metaphor of the “tourist gaze” signifies a defining characteristic of tourism as well as a distinct form of sociocultural activity. Evans-Pritchard’s (1989) study of Native American Indian images of tourists is illustrative of local responses to tourists’ all-consuming practices. She explains how Native American figurative jokes, folklore, and mythology are filled with examples of caricature images of the “white man” whereby stereotypical images are manipulated as they function to discriminate and empower the Native American Indian “hosts.” MacCannell (1992) argues that any social relationship which is transitory, superficial, and unequal is a primary breeding ground for deceit, exploitation, mistrust, dishonesty, and stereotype formation. Unfortunately, MacCannell does not relate this critical observation to the dynamics of power and thereby fails to facilitate an understanding of how or why they are contingently applied, as Evans-Pritchard successfully does.

As illustrated above, the implicit understanding of culture as difference and commodity, which is a functionalist and highly prescriptive approach, reduces culture to a static, place-bound entity commonly addressed as “clashes of difference” or “differences for sale” (Liburd and Ren 2009). Consequently, culture becomes either an exotic backdrop to help promote tourism or a vulnerable property of a disempowered “other” to be protected from the exploitation of tourism (Burns 2005). Both notions of culture as difference and a commodity are intricately connected with the tourism industry where culture is planned, offered, and managed as an image, product, service, or experience (Morgan and Pritchard 1998; O’Dell and Billing 2005). As a total social and economic

phenomenon, tourism is more than a service exchange, a product, or a superficial sociocultural encounter (Theobald 2005). It involves ongoing processes of communication, negotiation, translation, resistance, and adaptation that are meaningful to those who identify with a particular culture. Adopting a holistic understanding of culture, we propose that further research is needed to examine how culture works, what it does, and how it is negotiated and internalized when facing challenges and opportunities posed by tourism development.

Tourism, Economy, and Quality-of-Life

A source of foreign exchange earnings, tourism's *raison d'être* in the post-World War II era was its alleged contribution to the local and national economy. Since the first record of 25 million international tourist arrivals in 1950, following the advent of commercial jet travel, a consistent and remarkable growth has been demonstrated. Despite negative external influences such as terrorism and the global financial crisis halting growth rates, the industry continues to show remarkable resilience. Despite a number of setbacks during the last decade, forecasts by the UN World Tourism Organization (2001) suggest international arrivals will reach 1.6 billion by 2020 and will generate receipts of over US \$2 trillion (Fig. 7.1).

As a provider of profits for industry, tax revenues for government, and salaries for employees in the labor-intensive service industries, the economic impacts from tourism appear to be without peer (Smith 2001). In theory, the distribution of wealth and investments are a result of both tourists' expenditure on goods and services at the destination, (e.g., food and beverages, accommodation, local transportation, entertainment) and of investments in tourism facilities and infrastructure development (e.g., roads, water, sewage, airports, hotels). However, it has long been recognized that tourism did not offer a panacea for struggling economies and developing world countries. Britton's (1982) analysis of Fiji effectively linked tourism to dependency theory and unequal development. Drawing parallels between service and servitude in neocolonial contexts, other dependency theorists (Frank 1967; Emmanuel 1972; Wallerstin 1974; Amin 1976) argued that peripheral countries fail to establish their own manufacturing basis and market relations as a consequence of exploitative practices and unequal relations, while accelerating environmental degradation and the gap between rich and poor (Liburd 2010).

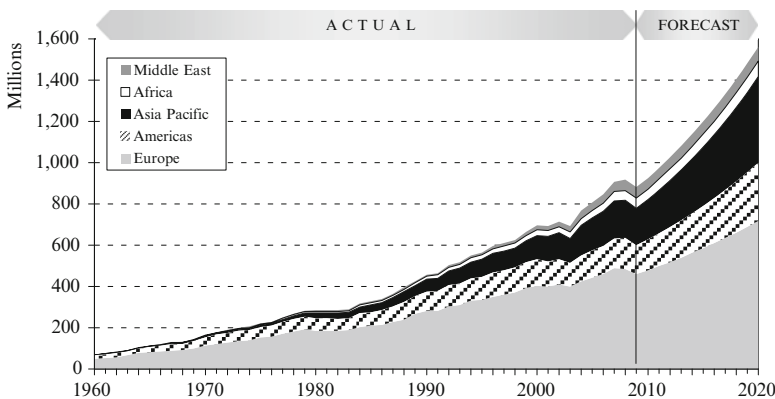


Fig. 7.1 UNWTO tourism 2020 vision forecast (Source: UNWTO 2010)

In order to understand tourism's actual contribution to the local economy, economic impact analysis has been applied to measure the direct and indirect impacts of tourist spending to the local economy or region (Cai et al. 2005). The initial injection of revenue to the local economy by tourists, for example paying a hotel bill, causes a direct effect. Indirect effects may occur when the hotelier purchases local supplies for the hotel's restaurant, which is represented by a second round of spending by the recipients of initial expenditures in other backward-linked industries. Induced impacts from tourism involve further spending by the beneficiaries of the direct and indirect effects on goods and services for their own consumption. The sales, income, and jobs that result from household spending of added wage, salary, or proprietor's income are induced effects. The magnitude of indirect and induced impacts depends on the inclination of businesses and households in the region to purchase goods and services from local suppliers. Whereas the intention to purchase locally is laudable, many small-scale producers are simply not able to meet the demand from hotel restaurants for timely delivery of quality products in large quantities. Moreover, catering to an international clientele, hotel restaurants may serve "choice cut" beef, cheese, Irish potatoes, broccoli, cauliflower, apples, pears, and strawberries which are not locally grown stock. The consequences of catering to the needs and wants of the developed world are high import bills and repatriated profits leaking from the local economy, which may only benefit existing localized or national elites (Meethan 2001, p. 44).

The ripple effect attributable to tourism in an economy is termed the "tourism multiplier." Multiplier effects are often cited to capture indirect and induced impacts (also referred to as secondary effects) of tourism spending and show the wide range of sectors in a community that may benefit from tourism. Although causing considerable disagreement and confusion among noneconomists, studies commonly focus on the foreign exchange earned through tourism, its contribution to the gross domestic product and the general employment rates (Sheldon 1990; Harrison 1992; Archer 1984). There are many different kinds of multipliers reflecting which secondary effects are included and which measure of economic activity is used (sales, income, or employment). Representing the economic interdependencies between sectors within a particular regional or local economy, multipliers vary considerably at regional and sectoral levels. It is therefore important to be aware that sales and job impacts can be quite misleading, as sales may be directed toward imports and job estimates do not account for part time, seasonal positions, and expatriate ownership (McAfee 1999). Tourism is renowned for its low pay and often low status of jobs that may be prone to seasonality (Deery and Jago 2009). In addition, the vastly different wage rates across industries and inflationary impacts on housing, property, and food prices are not accounted for.

Inadequate for conceptualizing impacts beyond those attributable to a monetary value (Tooman 1997), more recent tourism research has shifted focus from cost-benefit analysis based on visitor arrival numbers toward yield (Dwyer and Forsyth 1997; Becken and Butcher 2004; Northcote and Macbeth 2006). With the increasing sophistication of tourism data sets, such as the tourism satellite account (TSA), and economic models, such as computable general equilibrium (CGE) models, more useful measures of tourism yield have been developed to adequately assess the "rate of profit on tourism sales" or "rate of return on capital" (Dwyer et al. 2007). A TSA is simply a static set of accounts illustrating the size of the tourism industry in terms of value added, employment, and other variables of interest. The TSA does not disclose information on how a change in spending will impact on other industries and therefore, on the economy as a whole. Assessing how tourism spending will impact on an economy as a whole, a computable general equilibrium (CGE) model can be applied. Compared to alternative techniques, such as input-output analysis or multiplier techniques, CGE models typically estimate smaller "impacts" of a given change (Dwyer et al. 2007). Thus, different techniques should be used for estimating yield measures at different levels. Yield can be measured in terms of who's affected, e.g., from the perspectives of a business, an industry, a particular niche market, or a nation where it is associated

with the contribution to employment, gross domestic product, or gross value added. Further explored by Northcote and Macbeth (2006) and Dwyer et al. (2007), the concept of yield can be broadened to embrace sustainable yield by incorporating measures of sociocultural and environmental impact, recognizing the triple bottom line effects of tourism (Elkington 1997; Dwyer 2005; Dwyer and Faux 2010). Following this line of argument, the central ethical question as to who benefits from tourism development, and how, should be subjected to further research in the contexts of QOL and desirable futures.

Tourism, Environment, and Quality-of-Life

Ecosystems provide indispensable services to human beings by supporting life, supplying materials and energy, absorbing waste products, and providing culturally valuable assets. The maintenance of ecosystem integrity should thus be of paramount importance (Gössling 2002). In many countries or regions, the attraction to tourists can be found in the area's often free natural resources – beaches, mountains, climate, wildlife, sea, forests, rivers, lakes, waterfalls, and so on. Tourism is essentially a resource-based industry (Krippendorf 1982). Its impact on local physical environments, for instance, on coral reef damage caused by trampling, collecting, buying, and anchoring has been well documented (Jeffreys 1988; Hunter and Green 1995; Middleton 1997; Gössling 2002; Higham 2007). Related to global climate change, carbon emissions caused by human activities, including leisure travel, have been explored (Becken 2007; Gössling and Upham 2009; Miller et al. 2010). While consumer behavior and awareness of negative environmental impacts are in need of further research, trajectories can be drawn to Western environmental and conservation movements, international organizations, and conferences such as the 1972 UN Stockholm Conference on the Human Environment and the 1980 World Conservation Strategy. Furthermore, influential publications such as Carson's *Silent Spring* (1962) and Hardin's *Tragedy of the Commons* (1968) have successfully forged the links between the environment and development by pointing to disastrous environmental effects of uncontrolled human resource use (Miller and Twining-Ward 2005). During the industrial revolution in Europe and the United States, humankind demonstrated their ability to conquer and exploit nature. Analyzing American environmentalism, Rothman (1998, p. 34) describes how “taming rivers in the United States was both sport and mission.” Such behavior was firmly rooted in modernity's unprecedented belief in human rationality, as seen in economic growth models (Rostow 1952) and the political agenda following World War II where tourism became a favored means to development (Liburd 2010). Holden (2000) categorizes the negative impacts on the environment from tourism into three main areas: first, resource use and outcomes from tourism competing with other anthropocentric forms of development, second, human behavior toward the destination environment, and third, different forms of pollution (e.g., air, water, noise, aesthetic pollution). Other influential factors assumed to have a substantial impact on the environment include increasing world population, ecological depletion of the ozone layer, soil degradation, deforestation, loss of biodiversity, hunger, poverty, illiteracy, and uneven development (World Commission and the Environment and Development 1987).

Mass tourism appeared to not only represent but also directly contribute to these societal ills (Turner and Ash 1975; McElroy and de Albuquerque 1975). Subsequent calls for preservation to ensure a balance between civic, recreational use, and conservation were captured in the umbrella term “alternative tourism development” (Smith and Eadington 1989; Mowforth and Munt 1998). Described as “soft,” educational, responsible, slow, small-scale, green nature, ecotourism dominated the research agenda of the late 1980s (Liburd 2006; Butler and Boyd 2000; Eagles and McCool 2001). A number of small-scale, alternative tourism success stories were reported,

notably in the *Journal of Sustainable Tourism*. Analyzing the evolution of ecotourism, McKercher (2010) acknowledges that ecotourism would not exist, and certainly would not exist in the form it is now, were it not for the active involvement of the academic community.

Critics have pointed to the inherent class prejudice (Wheller 1992, 1993), opening up of fragile environments to mass tourism development (Butler 1991) and costs associated with changing paths from mass to small-scale tourism (Mowforth and Munt 1998). Overall, it can be argued that alternative forms of tourism development have reproduced a contemptuous view of the majority of people who travel with Miller and Twining-Ward (2005, p. 33) commenting that the alternative tourism platform has done little to address the overall “problematique” of mass tourism. More constructively, it was followed by a call for increased local participation in the development process (Gardner and Lewis 1996; Sharpley and Telfer 2002) and linked to concepts of equitable collaboration, empowerment, and sustainability (Jamal and Getz 1995; Cohen 2002). Setting out the priorities for sustainable development in the twenty-first century, *Agenda 21 for the Travel and Tourism Industry* (World Travel and Tourism Council, the World Tourism Organization and the Earth Council 1995) recognizes tourism as a model form of economic development that should improve the QOL of the host community, provide a high quality of experience for the visitor, and maintain the quality of the environment on which both the host community and the visitor depend.

Tourism, Leadership, and Quality-of-Life

Corporate social responsibility (CSR) is frequently applied to describe the contribution of the business sector to sustainable development. Corporate social responsibility is the concept “whereby companies integrate social and environmental concerns in their business operations and in their interactions with their stakeholders on a voluntary basis” (European Commission 2006). The comprehensive scope links economic performance of the enterprise with noneconomic (social and environmental) concerns of its stakeholders, and the voluntary nature, whereby the enterprise moves beyond its strictly legal obligations, is at the core of CSR. Bowen in 1953 described CSR as the obligation of businessmen to pursue those politics, to make those decisions, or follow those lines of action which are desirable in terms of the objectives and values of the society. This raises the key question of what is desirable for the society. Carroll (1991) classifies CSR by the nature of responsibility into four groups: economic (be profitable for shareholders, provide good jobs for employees, produce quality products for customers); legal (comply with laws and play by rules of the game); ethical (conduct business morally, doing what is right, just, and fair, and avoiding harm); and philanthropic responsibilities (make voluntary contributions to society, giving time and money to good works).

Arguably, the UNWTO has a leadership role in the promotion of a globally accepted CSR framework for tourism. The UNWTO’s influence manifests mostly onto its member governments, and its body of affiliate members (a business council, a destination council, and an education council) has been profiling good CSR practices in the areas of climate change and energy efficiency, environmental management, etc. While tourism predominantly is comprised of small- and medium-sized enterprises, many of which have little knowledge of UNWTO and its directives generally, the larger enterprises and tourism universities are cognizant of knowledge and recommendations generated by the UNWTO. Action by the UNWTO is further hampered by several structural weaknesses, e.g., not having the USA, Australia, the United Kingdom, and the Scandinavian countries as members, in addition to ambivalence on its responsibility toward the private sector (Tepelus 2010).

Representing private sector interests as a high-level forum of the presidents, chairs, and CEOs of the world’s leading travel and tourism companies, the World Travel and Tourism Council

(WTTC) exhibits a proactive approach to CSR in tourism. Entitled *Corporate Social Leadership in Travel and Tourism* (WTTC 2002), the report includes examples of corporate social leadership by top companies and presents the business case for CSR as favoring by governments and communities prioritizing sustainability; building brand value and the market share of socially conscious travelers; attracting socially conscious investors; enhancing ability for recruitment of highly skilled workforce; and improving risk assessment and response capacity. Arguing against regulation, the WTTC states that “a voluntary approach is crucial. To take advantage of what business has to offer – entrepreneurship, innovation, and management capability – companies must be free to choose how they respond to community needs as the competitive market dictates. Attempting to regulate social responsibility would not only be impractical, given the diverse needs of different communities, it would undermine the personal commitment and creativity that fuel it” (WTTC 2002).

International development and technical cooperation agencies are other stakeholders showing interest in socially responsible tourism as a leading approach to sustain economic development (Tepelus 2010). Development agencies such as the Dutch SNV, German GTZ, and the Italian Development Cooperation sponsor tourism development projects in poor countries and fund projects under the auspices of the UNWTO ST-EP initiative. USAID has also funded youth employment programs in tourism in Brazil (USAID 2005). Still, large financial institutions, such as the World Bank, noted the absence of ethical bases and experience of socially responsible guidelines in tourism development projects (Tepelus 2010). Reviewing all industrial sectors in 2003, the World Bank Group CSR Practice found tourism to be the “least developed in terms of codes of conduct and CSR initiatives” (World Bank and International Financial Corporation 2003).

Carlsen and Wood (2006) argue that CSR in tourism is primarily concerned with successful enterprises and their relations with employees and communities. Proponents of CSR argue that it is in the interests of the tourism industry to maintain a destination’s appeal and competitive advantage and the belief that, consequently, self-regulation is an effective pathway to sustainability (Bramwell and Allentorp 2001). CSR approaches to sustainability frequently involve regulation through codes of conduct and other devices for corporate compliance, which appear not to have broad appeal among small tourism operators (Griffin and De Lacy 2002). Whereas Hjalager (2010) argues that innovative suppliers can drive sustainable tourism development, the responsibility for implementing CSR appears to have been assigned to larger corporations and government regulators. The majority of smaller operators in destinations are left to voluntarily participate in programs that may enhance tourism’s contribution to QOL.

Assessing Tourism and Quality-of-Life

Tourism has been described as an industry and experience that offers great potential for enhancing the quality-of-life for both travelers and guests (Crouch and Ritchie 1999; Lindberg and Johnson 1997; Milman 1998; Pearce 2009; Perdue et al. 1999). More broadly, the relationship between leisure and QOL has been well explored in the literature (Haworth and Lewis 2005; Iwasaki and Smale 1998; Kleiber et al. 2002; Liburd and Derksen 2009; Bergin-Seers and Mair 2009). This stream of the literature tends to focus on the contribution that leisure makes to the quality-of-life of leisure participants.

In tourism, the focus has tended to be more on the impacts of tourism on quality-of-life in host communities (Moscardo 2009; Andereck and Jurovski 2008; Carmichael 2008). As illustrated in the context of tourism’s sociocultural impact above, host impact studies have generally asked residents to agree or disagree with statements regarding perceived impacts from tourism on their community. Demographic analyses are routinely performed but segments and clusters are more

often formed on the basis of other characteristics, such as the attachment to the visitor industry, the perceived benefits to locals, or general attitudes toward development and the environment. Findings from a study of 28 Colorado communities by Long et al. (1990) supported researchers' hypothesis that resident perceptions of both the positive and negative impacts of tourism development increase with increasing level of development. Andereck and Vogt (2000) found significant differences among communities in Arizona regarding tourism as an economic development strategy. They found that attitudes were not necessarily a good predictor of the actual future support of a proposed tourism attraction (Andereck and Vogt 2000, p. 35) and recommended combining qualitative and quantitative research methods to explore these issues. A caveat with all resident attitude surveys is that they are a snapshot in time; thus, events during the time span of the data collection could sway public opinion. Spatial context is also known to influence resident attitude surveys. Many resident attitude studies are conducted statewide, or as regional analyses. McCool and Martin (1994) identified a potential division between those who promote and benefit from tourism and those who live somewhat separate from the tourism community. Roe et al. (1997), in their study of wildlife tourism, found that the size and scale of the industry development, degree of involvement, and relationship between tourists and residents affect the relative importance attributed to tourism in a community.

Described as butterfly collections of tourism's impact from various testing grounds (Noronha 1979), findings from resident attitude studies vary widely due to the community context, the theoretical orientation, and the applied survey method. Moreover, Moscardo and Pearce (1999) assert that those conducting attitude surveys have too often imposed their own perceptions of tourism's impacts on respondents. Their claim is further supported by recent findings from the first *Tourism-Specific and Quality-of-Life 'Budapest Model'* (Ministry of Local Government 2008): "The Impacts of Tourism (IT): This domain proved to be the most problematic, since many residents never thought of the various impacts from tourism before. This made their reactions very random." (Ministry of Local Government 2008, p. 11)

By contrast, QOL research aims to understand how these impacts are internalized and influence an individual's overall life satisfaction (Andereck et al. 2007). QOL can be defined as "the notion of human welfare (well-being) measured by social indicators rather than by quantitative measures of income and production" (OECD 2005, p. 1). The OECD definition is particularly useful because it emphasizes the value of things other than income and economic growth and highlights the importance of subjective well-being. The Economist Intelligence Unit's (2005) QOL index demonstrates that over several decades, there has been only a very modest upward trend in average life-satisfaction scores in developed nations, whereas average income has grown substantially. It has long been clear that GDP is an inadequate metric to gauge well-being over time particularly in the economic, environmental, and sociocultural dimensions of sustainability (Stiglitz et al. 2009, p. 8). Subjective well-being has been recognized as a key aspect of QOL (Cummins 1996). Subjective well-being refers to an individual's sense that life overall is going well, and research in this area is usually concerned with understanding people's perceived satisfaction with the circumstances in which they live (Diener and Suh 1997; Costanza et al. 2007; Malkina-Pykh and Pykh 2008).

A number of frameworks have been developed to assess subjective well-being. The basic premise is that life satisfaction is functionally related to satisfaction with all of life's domains and sub-domains (Sirgy et al. 1999). Alkire (2002) provides a review of various different frameworks for describing the dimensions of QOL and identifies seven authors whose work has been extensively used in the literature. The number of dimensions identified from these models ranged from 5 to 11. Sirgy (2002) has examined QOL from a marketing perspective and has provided a review of 13 different models which contain between 5 and 16 dimensions or domains. There are a set of common recurring themes across all of these different approaches. An earlier review by Cummins (1996) found strong evidence of five main domains – material well-being, emotional

well-being, health, productivity, and friendship – and some evidence to support two further dimensions of safety and community. Furthermore, spillover effects of satisfaction in major life domains such as leisure on overall life fulfillment are widely recognized in literature (Neil et al. 1999; Sirgy 2002).

To date, there is very little research on how tourism can contribute to the subjective well-being of those involved in travel and tourism (Chon 1999; Benckendorff et al. 2009). Whereas work-life balance has been extensively researched over the past 20 years (Roberts 2007; Sirgy et al. 2008), only a few studies, to date, have focused on the QOL of the employees in the tourism and hospitality sector (Deery 2008). Findings by Deery and Jago (2009) argue that the issues of work-life balance are exacerbated in the context of the tourism industry. This is due to the long and unsocial working hours, low pay, and often low status of some tourism jobs that may be prone to seasonality, also causing a high employee turnover (Deery 2008). In contrast, Pocock et al. (2007) found that while employees, in general, may have substantial concerns regarding high spillover from work to life, they still indicate an overall level of satisfaction with their work-life balance. Sirgy et al. (2008) are suggestive in their description of quality of work life programs to promote employee well-being in the workplace. They assert that the spillover from one's experience in the work life domain to one's satisfaction/dissatisfaction with life, in general, is affected by a number of moderators, e.g., organizational commitment. This is a critical area in need of research and new managerial practices in the tourism and hospitality industry where examples of corporate social responsibility are still limited (Bohdanowicz and Zientara 2009; Tepelus 2010).

It is important to note that the above mentioned studies also demonstrate that tourism does not simply “impact” on people whose cultures and environments are exposed to and/or destroyed by tourism development. Rather, people are engaged in numerous networks, relations, and processes whereby tourism is appropriated as one motivating resource among many – whether for “development” or subjective well-being. The first tourism and QOL “Budapest model” tested at four Hungarian destinations and in ten countries (Brazil, Czech Republic, Finland, Malaysia, Portugal, Russia, Slovakia, South Africa, the Netherlands, and United Kingdom) in 2007 and 2008 is undergoing critical modification to firmly ground the questionnaire in QOL domains. The research novelty of the “Budapest model” and the attributes presented next in this chapter is that both approaches go beyond the traditional approaches to attitudes and impact analyses.

Importance-Performance Analysis

Importance-performance analysis is a technique which has been predominantly used in marketing and consumer research to gauge customer acceptance and satisfaction with products and services. The technique is based on the notion that the importance of different product or service attributes vary and that customer satisfaction is mediated by the importance of each attribute and how well these attributes meet expectations. Martilla and James (1977) provide an early description of the technique and illustrate their account with an example of automotive services. In more recent times, IPA has been used in both the tourism and hospitality literature to examine travelers' preferences for service delivery and product or destination attributes (cf. Chu and Choi 2000; Deng 2007; Deng et al. 2008; Enright and Newton 2004; Go and Zhang 1997; Hudson and Shephard 1998; Pike 2002; Smith and Costello 2009; Uysal et al. 1991).

IPA offers a more sophisticated approach for measuring customer satisfaction because it assesses multiple attributes and displays these in a framework which is transparent and readily understood by practitioners. Despite these advantages, several authors have identified shortcomings of using the technique for consumer research. While a full evaluation of the technique is

beyond the scope of this chapter, useful critiques are provided by Oh (2001) and Matzler et al. (2004). According to Crompton and Duray (1985), importance–performance analysis is a three-step process which involves:

1. The identification of key attributes through a literature review, focus group interviews, or other techniques
2. Surveying of respondents to determine the importance and performance of each attribute
3. Calculating importance and performance scores for each attribute and presenting these on a two-dimensional IPA grid

The IPA grid is divided into four quadrants based on the importance and performance scores of the attributes. The four quadrants are labeled: “Concentrate Here” (high importance, low performance), “Keep Up the Good Work” (high importance, high performance), “Low Priority” (low importance, low performance), and “Possible Overkill” (low importance, high performance).

While the most common applications of IPA are found in the marketing field, the use of IPA has been extended beyond consumer evaluations to include other types of respondents. Evans and Chon (1989) used the approach to survey business managers to develop and evaluate tourism policy in two separate mountain destinations in the United States. The analysis presented in this chapter uses a similar approach by combining IPA with an expert informant approach.

Identifying Key Attributes of Tourism and Quality-of-Life

The key QOL attributes used in this chapter were identified through a collective expert informant approach. The expert informant technique is an ethnographic approach based on the notion that most communities contain experts who, as a result of their personal skills or position within a society, are able to provide detailed information and insights into what is going on around them (Tremblay 1982). While the approach often involves interviewing informants, Zelditch (1962) distinguishes informants from interviewees by highlighting that informants provide information about others and about events in which they may not necessarily have participated. Rather than conducting individual interviews with expert informants, this study used the futures wheel technique to bring together a number of experts to discuss how tourism contributes to QOL.

The futures wheel is a structured mind mapping technique developed by Glenn in 1971 (Glenn 2003). It is most commonly used as a graphical tool to explore the impacts or consequences of trends, events, or decisions (Benckendorff et al. 2009; Deal 2002). The wheel organizes these impacts or consequences as a series of concentric rings or circles centered on the specific trend, event, or decision being explored (Glenn 2003). In the first or innermost ring are the most immediate or primary consequences. Leading on from each of these are secondary consequences arranged in a second ring, with a third ring of tertiary consequences (Glenn 2003). While futures wheels are a useful tool that allows groups of experts to contemplate the consequences of trends or events, they also provide a visual record of issues and attributes for further analysis.

The initial set of QOL attributes were extracted from a set of futures wheels that were generated collectively by participants at the 2008 BEST Education Network Think Tank VIII in Izmir, Turkey. The BEST Education Network is an international consortium of educators committed to furthering the development and dissemination of knowledge in the field of sustainable tourism. The main objectives of BEST EN think tanks are to generate information that can be used to identify research agendas for areas related to sustainable tourism, develop industry case studies, and assist in the development of educational materials for tourism courses. BEST EN think tanks are annual 3-day events which address a particular theme. The 2008 Think Tank was themed *Sustaining Quality-of-Life Through Tourism* and sets out to identify knowledge gaps and provides insights into the topic of sustainable tourism and QOL.

The approach adopted for the BEST EN think tank included several stages. First, a framing paper was presented to form the basis for discussion in the ensuing futures wheel sessions. Next, a series of workshops were conducted with 43 expert informants consisting of educators, researchers, and practitioners attending the event. These delegates represented a range of countries in Asia, the Americas, the Middle East, Europe, and Oceania and included experts with both a wide range of disciplinary backgrounds (including geography, psychology, anthropology, sociology, economics, and management) and a wider range of tourism experiences and interests. The workshops were broken into two main stages: the generation of potential desirable futures for tourism and its contribution to QOL; and the use of the combined futures wheel and backcasting techniques to identify pathways to achieving these futures. The futures wheels were generated during a brainstorming session to develop ideal futures for tourism as a contributor to QOL. The brainstorming session was conducted according to the guidelines outlined by Marín et al. (2008) and focused on identifying ways in which tourism could contribute to improving any aspects of QOL. Examples of the futures wheels generated by the think tank are presented in Benckendorff et al. (2009). The futures wheels were analyzed to identify the key attributes of tourism as a contributor to QOL. This analysis revealed 45 attributes which were rewritten as opinion statements (Table 7.1) to be tested in the next stage of data collection.

Evaluating Quality-of-Life Attributes

Once the salient attributes were identified, feedback was then sought from a wider range of expert informants on the importance and performance of the various QOL attributes using an online questionnaire. The key informants were individuals who had experience in the field of sustainable tourism. Three groups of informants were of interest: (1) academics who work in the tourism field, (2) destination managers, and (3) staff working for nongovernment organizations (NGOs). The questionnaire required informants to identify the destination that they were most familiar with, and respondents were asked to rate the importance and performance of tourism in the context of the destination they had nominated.

The informants were recruited using an email invitation posted on TRINET (Tourism Researchers International Network), an electronic bulletin board which links over 1,300 tourism researchers worldwide. The online survey tool used for data collection was set up to allow for multiple respondents using the same computer. This flexibility was permitted because it was recognized that some respondents, e.g., from developing countries may use shared computer facilities. The survey tool captures the IP address for each respondent, and this allows for the identification of respondents who may attempt to manipulate the data by submitting multiple surveys. Surprisingly, the dataset did include several multiple responses from the same individuals, and these duplications were removed to maintain the integrity of the data.

The online questionnaire attracted 162 respondents; however, some of these responses included duplicate responses from the same individual while others responses were incomplete. These response were removed, leaving 109 completed questionnaires. Of these, a further 26 questionnaires were excluded from further analysis because respondents did not complete some of the importance or performance items. The online questionnaire was completed by a self-selected sample of expert informants, and the authors recognize that this imposes several limitations on the data presented in this chapter. However, the method that was employed was thought to be the best approach for accessing an international sample of expert informants.

The informants included a broad range of respondents representing 34 different countries; however, most responses were received from experts familiar with Australia (11), the USA (11), the United Kingdom (8), and Canada (6). Countries were categorized as developed or developing

Table 7.1 Exploratory factor analysis of key attributes of tourism and QOL

Attribute	Factor loading	Importance		Performance		Gap
		Mean	SD	Mean	SD	
Factor 1 Social and environmental responsibility (EV = 10.99; %Var = 24.4)						
Factor 1.1 Corporate social responsibility						
7	Tourism is concerned with the health of workers	0.740	0.72	3.84	2.78	0.64
10	Tourism is based on sound legislation	0.729	0.99	3.81	2.82	0.99
34	Tourism provides job security	0.716	0.84	4.00	2.78	1.01
17	Tourism embraces positive societal change	0.710	0.97	3.79	2.52	1.00
32	Tourism provides good working conditions	0.702	0.89	3.83	2.99	0.94
48	Tourism provides fair wages	0.687	0.84	3.92	2.77	0.94
41	Tourism is a role model for employing people with disabilities	0.674	1.02	4.01	2.60	1.09
20	Tourism values human resources	0.663	1.00	3.40	2.16	0.94
29	Tourism employers are socially responsible	0.656	0.85	4.07	2.90	1.03
44	Tourism fosters the distribution of economic wealth	0.638	1.11	3.84	2.78	0.93
2	Tourism stakeholders behave responsibly	0.628	1.05	3.81	3.14	1.00
39	Tourism is accessible to all equity groups	0.620	1.05	4.06	2.80	0.91
40	Tourism is at the forefront of bio security	0.567	0.88	3.96	2.75	1.21
3	Tourism empowers the community	0.543	0.98	3.15	2.30	0.99
31	Tourism provides high job satisfaction	0.520	0.94	3.96	3.13	0.97
43	Tourism is economically viable	0.452	0.86	3.81	2.77	0.97
9	Tourism jobs are relatively well paid	0.439	0.65	4.35	3.73	0.93
28	Tourism adopts best practice safety measures	0.412	0.87	3.87	2.88	0.92
			1.05	3.53	2.30	1.05
Factor 1.2 Environmental contribution						
12	Tourism contributes to conservation	0.819	0.78	3.97	2.87	0.79
37	Tourism is informed by the latest research	0.744	0.84	4.10	3.23	0.87
42	Tourism is a role model for creating healthy environments	0.744	1.03	3.84	2.65	1.08
8	Tourism conducts environmental and social impact assessment	0.734	0.95	3.82	2.82	0.97
11	Tourism practices integrated resource management	0.644	0.92	3.99	2.78	1.06
			0.94	4.08	2.89	1.00

Factor 2 Leadership (EV = 5.68; %Var = 12.62)							
23	Tourism develops champions and leaders	0.708	30.67	0.69	2.70	0.64	0.96
18	Tourism facilitates knowledge management	0.681	3.63	1.05	3.06	0.95	0.57
27	Tourism jobs have high social status	0.677	3.72	0.90	2.92	0.97	0.80
38	Tourism interfaces with academia	0.643	3.33	0.98	2.20	0.97	1.13
36	Tourism supports professional development	0.635	3.86	1.01	2.75	1.12	1.11
25	Tourism has recognized career pathways	0.585	3.95	0.70	2.95	0.90	1.00
13	Tourism is at the forefront of addressing climate change	0.551	3.83	0.85	2.82	1.06	1.01
26	Tourism is a leader in technology	0.523	3.78	0.88	2.40	0.99	1.38
Factor 3 Economic contribution (EV = 3.82; %Var = 8.49)							
35	Tourism is a profitable sector	0.744	4.21	0.49	3.72	0.64	0.49
30	Tourism has high employment growth potential	0.674	4.24	0.69	3.53	1.02	0.71
45	Tourism makes a contribution to income and jobs	0.640	4.06	0.76	3.67	0.87	0.39
15	Tourism contributes to economic viability	0.617	4.35	0.61	3.86	0.78	0.49
24	Tourism presents entrepreneurial opportunities	0.610	4.34	0.65	3.80	0.78	0.54
21	Tourism contributes to public infrastructure	0.603	4.16	0.71	3.81	0.85	0.35
Factor 4 Cultural understanding (EV = 3.72; %Var = 8.26)							
19	Tourism facilitates intercultural exchange	0.778	4.14	0.74	3.65	1.01	0.49
5	Tourism promotes respect of indigenous cultures	0.585	4.03	0.63	3.45	0.67	0.59
47	Tourism encourages local entrepreneurs	0.501	4.05	0.77	3.60	0.90	0.45
1	Tourism development fits with global trends	0.443	4.18	1.07	3.18	0.99	1.00
Factor 5 Community contribution (EV = 3.40; %Var = 7.56)							
46	Tourism uses local goods and services	0.797	4.12	0.77	3.52	0.85	0.60
6	Tourism provides a fair economic return to communities	0.554	3.78	0.86	3.48	0.94	0.30
16	Tourism contributes to reducing social inequality	0.546	4.08	0.72	3.08	0.72	1.00
4	Tourism enables local ownership	0.451	4.23	0.86	3.22	0.94	1.01
			4.18	0.78	3.06	0.94	1.12
			3.88	0.97	2.76	0.96	1.12
			4.05	0.96	3.30	1.00	0.75

Note: EV Eigenvalue, %Var percentage variance, SD standard deviation

according to the International Monetary Fund's classification of developing economies. Thirty-five percent of experts responding to the questionnaire reported on developing countries, indicating that these nations are underrepresented in the analysis. Eighty percent of respondents were affiliated with a university, with the remaining experts reporting an affiliation with an NGO or a tourism destination or operation. The questionnaire also included an open-ended question, providing all respondents with an opportunity to include additional comments about the contribution that tourism makes to QOL in the country they were most familiar with.

Importance-Performance Analysis of Tourism and Quality-of-Life Attributes

The analysis commenced with the calculation of importance and performance means for each of the 45 key attributes. While these means were informative, a framework was needed to simplify the subsequent IPA analysis and presentation of results. To achieve this, the perceived importance of the 45 key QOL attributes was factor-analyzed using principal component analysis with orthogonal VARIMAX rotation. The exploratory factor analysis was conducted simply as a means of grouping items together for further analysis rather than exploring the underlying structure of the data for conceptual development. The results of the factor analysis suggested a five-factor solution which explained 61.3% of the variance in the data with Eigenvalues greater than one. The results of the factor analysis produced a clean factor structure with relatively higher loadings on the appropriate factors.

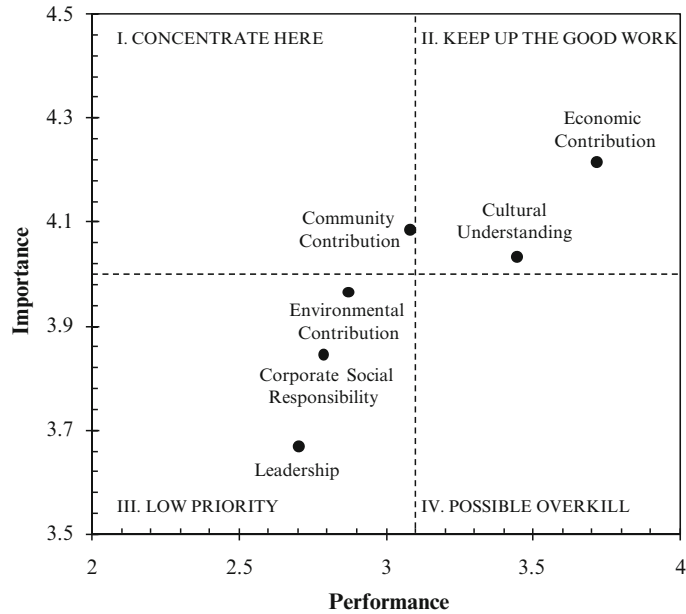
The first factor included 23 key attributes which were mostly concerned with social and environmental responsibility. A second order factor analysis was conducted to further separate the first factor into smaller groups of key attributes. The 23 key QOL attributes that made up the first factor were again factor-analyzed using principal component analysis with orthogonal VARIMAX rotation. The results produced a clear two factor solution explaining 60.8% of the variance. The first factor contained items related to corporate social responsibility, while the second factor included items related to environmental responsibility.

The other factors from the initial factor analysis provided four other clear and convenient groupings of key attributes. Based on the items which were most strongly correlated with each factor, the factors were labeled leadership, economic contribution, cultural understanding, and community contribution. The results of the factor analyses are presented in Table 7.1. The table also provides a summary of the aggregate mean and standard deviation for each factor as well as means and standard deviations for individual attributes. The far right column provides an indication of the gap between performance and importance ratings.

Many of the factors are at the core of notions of sustainable tourism, demonstrating that sustainable forms of tourism, impacts, and QOL are inextricably linked. The results indicate that there are a number of notable gaps in the importance and performance of the attributes and factors identified. The importance ratings were higher than the performance ratings for all attributes that were considered. The standard deviations for each of factors are reasonably consistent but the high values for individual attributes indicate a lack of consensus on some items. A simple interpretation of the means indicates a level of dissatisfaction with the performance of tourism as a contributor to QOL. However, it is difficult to determine which attributes are the foci of most concern. Therefore, the next step in this research was to subject the various factors of IPA to more clearly identify which aspects of tourism are perceived to contribute to QOL and which attributes are performing poorly.

To provide a general overview of tourism's contribution to QOL, an IPA was conducted on the six broad groupings that emerged from the factor analysis. The IPA grid for this analysis is

Fig. 7.2 Importance-performance analysis of tourism and QOL factors



presented in Fig. 7.2. The overall means for importance and performance were used for the placement of the axes on the grid. While there are various methods for placing the crosshairs on an IPA grid, Deng (2007) observes that the overall means of performance and importance are commonly used to divide the matrix into four quadrants.

The IPA grid indicates that most experts perceived the economic contribution of tourism to QOL to be the most important. Tourism was also perceived to be performing well on this attribute, placing it within the “keep up the good work” quadrant. Generally, tourism also appears to perform well in facilitating cross-cultural exchange and understanding. There is correlation between the commodification of culture identified in the literature and the need to generate quantifiable economic returns for host communities. If these cultural and economic exchanges take place in an ethical and equitable manner, enhanced QOL for both host communities and also the tourists themselves can ensue. However, responsibility for ensuring that economic benefits and positive cross-cultural exchanges are realized rests with the agglomeration of heterogeneous organizations and businesses that comprise the “tourism industry” in a destination, and the analysis indicates that benefits of exchange are not being optimized. Tourism exchanges may well be in favor of the tourism industry and their customers in the form of economic returns and culturally enriching experiences ahead of the host communities that do not always benefit.

Attributes that comprise the factors that relate to community and environmental contribution, CSR, and leadership are not considered a priority either in the extant literature or by expert respondents. The literature review demonstrates that historically, the tourism industry has shown limited concern for community ownership and equity, ecological impacts, resource conservation, social responsibility, and leadership. The ability for tourism to contribute to the QOL of local communities was regarded as important, but the perceived performance of tourism in this area was just below the overall mean. As a result, the IPA grid indicates that this factor falls within the “concentrate here” quadrant and needs further attention. Tourism was also regarded as performing poorly on the remaining three factors, but most respondents indicated that these factors were less important, placing them in the “low priority” quadrant. Given the current global emphasis on climate change, it is particularly interesting that the environmental

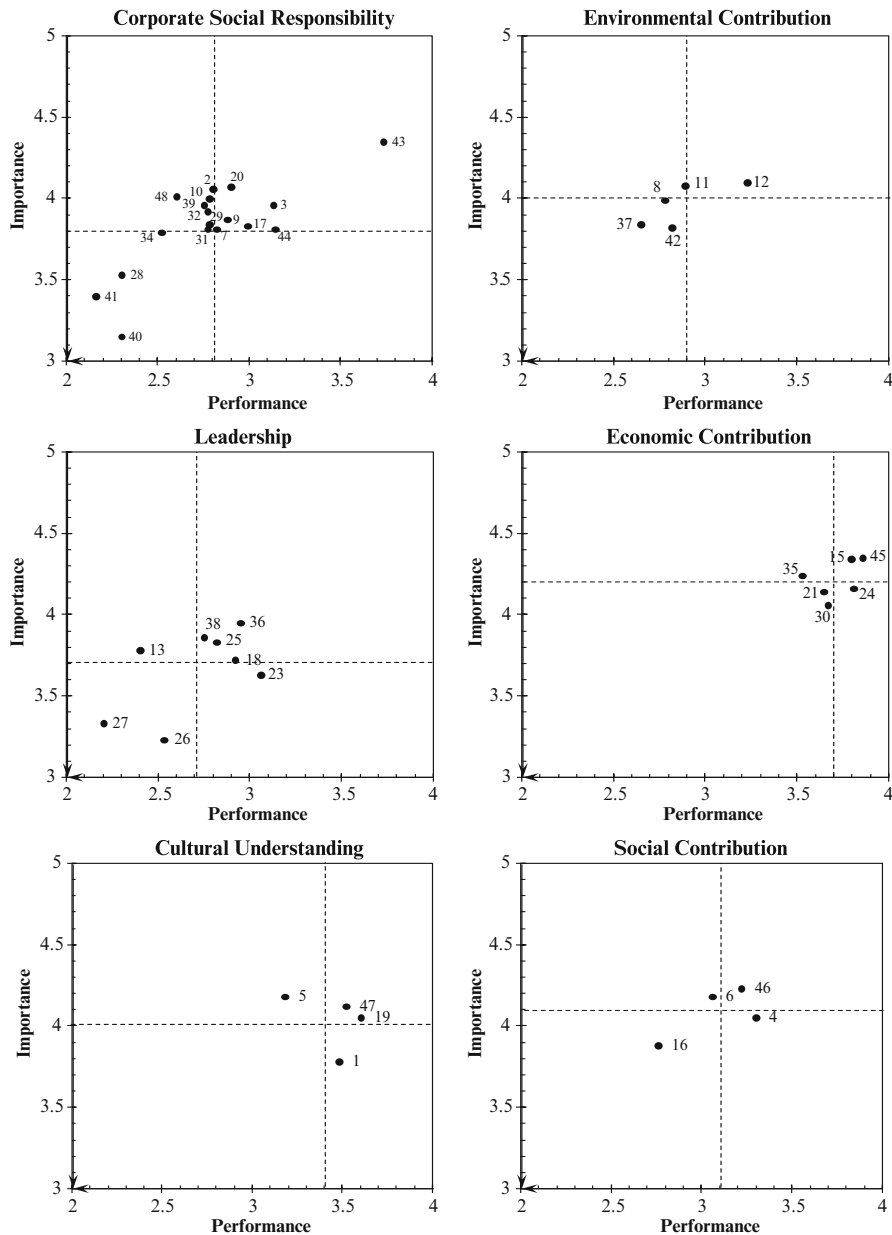


Fig. 7.3 IPA grids for six factors

contribution of tourism to QOL was located in this quadrant, although arguably, this item is not far removed from the “concentrate here” quadrant.

While this broad overview is informative, it is more useful to consider each of the factors in more detail to better understand how the different attributes within a factor perform. The approach adopted in this chapter was to develop IPA grids for each of the six factors that have been identified. These grids are shown in Fig. 7.3. The numbers for individual attributes correspond with the item numbers shown in Table 7.1. The overall mean for each factor was used to place the

quadrants for these individual grids. As a result, the placement of quadrants varies from one factor to another. While an argument could be made that this approach creates an illusion that more work is needed on particular attributes which perform well overall, the approach was selected because it is consistent with the notion of continuous improvement. In other words, there is an expectation that the tourism industry must continually strive to improve its performance in all areas, including those in which tourism might be perceived to perform admirably.

The first grid in Fig. 7.3 indicates all of the attributes that make up the corporate social responsibility factor. The grid indicates that most attributes are fairly tightly clustered around the center of the grid. While the IPA grid in Fig. 7.2 generally suggests that this factor is a low priority for further improvement, there are a few interesting outlying attributes in Fig. 7.3. The idea that tourism should be economically viable (43) if it is to contribute to QOL is well rated in terms of both importance and performance. Arguably, this attribute should have been included with the other items that make up the “economic contribution” factor, and its placement in the “keep up the good work” quadrant is entirely consistent with the other economic-oriented attributes. Several items are squarely in the low priority quadrant, most notably that tourism should be at the forefront of biosecurity (40); that tourism should be a role model for employing people with disabilities (41); and that tourism should adopt best practice safety measures (28). Item 34 (tourism provides job security) is placed just outside the “needs more work” quadrant, but this item is worthy of further discussion. The high standard deviation scores shown for this item in Table 7.1 suggest that respondents were polarized by this attribute. Attribute 48 (tourism provides fair wages) is most convincingly placed in the “needs more work” quadrant. The conclusion from the CSR IPA grid is that while this factor is a low priority overall, the issues of job security and fair wages need further attention. This conclusion is also supported by several of the open-ended responses, but the issue is a little more complex than it might appear at first glance:

I have been involved in tourism as a trade unionist and I have experienced real poor conditions of work and wages in that sector.

There are great inequalities in salaries in tourism - ranging from 120 Euros per month (the national minimum monthly salary) to more than 1500 Euros per month.

In my experience, tourism jobs are a two edged sword in Tanzania. They pay well, but those who earn good money can be ostracized by their social networks.

Tourism's impact such as increased traffic, congestion and competition for recreational resources are issues but these are offset by employment and taxes which are necessary. More concern with tourism jobs being low paying, low skilled and subject to seasonality.

Tourism jobs tend to be seasonal and badly paid and the communities have only started to benefit from the development of certain forms of tourism.

The second grid in Fig. 7.3 examines the environmental performance of tourism in more detail. The grid suggests that tourism is perceived to be a positive contributor to conservation. There are no attributes that fall clearly into the “needs more work” quadrant. The third grid examines tourism's role as a leading industry. This factor was rated as a very low priority overall, with respondents being particularly unconcerned that tourism jobs should have high social status (27) or that tourism should be a leader in technology (26). These attributes would not appear to greatly enhance tourism's ability to contribute positively to QOL. However, many respondents felt that the tourism sector should show more leadership in addressing climate change (13).

The economic contribution factor was rated very positively overall by the expert informants, and the grid of individual attributes for this factor shows a tightly bunched pattern. While attribute 35 (tourism is a profitable sector) does fall within the “needs more work” quadrant, the result is not particularly convincing. Relative to other industries, tourism does have notoriously low profit margins, so there would appear to be some support for the idea that tourism could perform better on this measure and that this would enhance the QOL of some stakeholders.

The conclusion from this grid is that the economic contribution of tourism is critically important in enhancing QOL, but the sector does appear to perform well in this area, with some opportunities for improving industry profitability.

When examining the cultural understanding grid, it is clear that many expert informants feel that tourism is not performing particularly well in promoting respect for indigenous cultures (5). This attribute clearly needs improvement. The industry may need to examine how indigenous people are portrayed and presented and also how indigenous workers are treated to further enhance the QOL of these stakeholders. Other attributes in this factor score very well, and overall, the factor is placed in the “keep up the good work” quadrant.

The final factor is concerned with the contribution tourism makes to local communities. Overall, this factor was regarded as an area of concern, but of particular concern is the need for tourism to provide a fair economic return to communities (5). While the economic contribution of tourism overall was perceived to be very positive, this final grid illustrates that there is clearly a perception that this economic contribution often does not benefit local communities. Several quotes from respondents address this theme:

Tourism is too focused on the economics. Tourism should be about health of communities and well being of all stakeholders (especially the hosts).

Stakeholders benefit from the high profits previously made by the sector and the real estate development but much of this does not “trickle-down” to the poorer levels of the society and foreign workers have no legal or trade union protection.

Additional analysis was conducted to explore whether there were any differences in the importance and performance scores between respondents from developed and developing countries. A nonparametric Mann-Whitney analysis indicated no significant differences between respondents from developed and developing countries.

The open-ended comments provided by most respondents were very informative and highlighted a number of additional considerations. The influence of external forces such as unions and government legislation may improve the contribution of tourism to QOL, but these benefits were often not initiated or driven by the tourism “industry”:

Denmark is strongly unionized and as such minimum wages are relatively high compared to other developed economies. Environmental protection is highly valued but not driven by tourism but by legislation at both national and European (EU) levels.

If tourism is being conducted in Cambodia in a socially, environmentally and ethically responsible manner, it is because of the efforts of a few academics and researchers and a plethora of NGOs operating in that country who use tourism to alleviate a whole lot of other social issues.

One respondent also observed that it was important to consider the contribution of tourism to QOL in the context of other industries and sectors:

Tourism is a sector, which gains increasing importance, not because of the strengths of tourism and because tourism is performing in a good way, but because other sectors are not performing (decreasing primary sectors, industrial outsourcing).

Several respondents found it difficult to evaluate the contribution of tourism to QOL at a national level, as the following quotes illustrate:

Canada is such a vast country that the realities are very different depending on which region we’re talking about.

The United States is a big country... I think there are major differences in the different states and based on type of destination.

It is difficult to generalize about a country as diverse as the UK...

Likewise, a number of respondents pointed out that there are big differences between various sectors of the tourism industry:

Due to the variety of jobs, businesses and tourism opportunities, there are significant differences in the impacts of tourism in general and the quality of life in particular. Some areas benefit, others don't.

"Tourism" embraces too many different industries and thus cannot be used in such a manner as to represent one homogenous sector.

On the other hand, some respondents had no concerns thinking about tourism from a more holistic perspective:

On the whole, tourism is fairly all-encompassing in the UK and does affect the quality of life of many people, even those not obviously employed in tourism, in a positive way.

On the whole tourism contributes greatly to the quality of life in the United States.

Tourism can contribute to the quality of life (in relation to the amenities and facilities that are supported by the visiting population) ... on the whole good places to visit are also good places to live.

As one respondent suggested, "it depends on what type of tourism and whose quality-of-life is at issue (tourists, tourism operators, tourism employees, local community, etc.)." The view adopted in this chapter is that QOL can be assessed and analyzed at various levels. The authors are cognizant of the limitations of using entire countries as a basis for evaluating the contribution of tourism to QOL. Likewise, the authors are aware that tourism is not a homogenous industry but rather an agglomeration of heterogeneous organizations and businesses all seeking to attract visitors. However, the nature of this work is exploratory, and the holistic and generic level of analysis adopted was deliberately intended to stimulate discussion and debate around the effectiveness of tourism as a contributor to QOL across a variety of salient dimensions. This chapter has illustrated how a number of attributes can be identified and evaluated at a more holistic level, but the open-ended comments suggest that further work in this area might adopt different levels of analyses, including:

- Different geographic scales
- Scale/relative importance of tourism in a particular destination
- Contrasts between metropolitan and regional/rural destinations
- Comparisons between different industry sectors
- Organizational size (i.e., multinational companies vs. small businesses)
- Different jobs and levels of pay within a sector
- Comparisons between communities with different characteristics
- Comparisons of the benefits of tourism for different stakeholders

Conclusion

The potential for tourism to contribute to economic development has long been recognized by the development theorists, agencies, and scholars with a concern for seeking global solutions to problems arising from underdevelopment, poverty, and inequity, particularly in the Third World. The belief was that tourism development initiated by western, "neocolonial" countries would generate flows of investment, income, and employment that would trickle down to host communities, thereby enhancing overall QOL. Going beyond the traditional approaches to attitudes and tourism impact analyses, this chapter demonstrates that tourism, according to expert opinion, has achieved mixed results in these endeavors.

A review of the literature on the sociocultural, economic, and environmental impacts of tourism indicates that scholars hold multiple perspectives on how tourism has developed and the net effects it has had on host communities. Much of the literature is prescriptive in nature, suggesting that there are certain negative impacts on host communities that should be anticipated and avoided, such as cultural commodification, economic exclusion, and environmental degradation.

However, it is also possible to identify alternative approaches to tourism development that will generate positive effects through sustainability, corporate social responsibility, and community leadership, and these approaches are considered to correlate with improvements in subjective well-being and QOL.

The identification of the multiplex attributes that comprise and convert the positive impacts of tourism into enhanced QOL for tourists and host communities has been a complex undertaking. Some 45 attributes have been identified and rated by experts in tourism development, which in itself indicates the responsibility for achieving improvements in well-being, and QOL is beyond the agglomeration of businesses and organizations collectively referred to as the tourism industry. Furthermore, analysis of these attributes and the performance of the tourism industry has revealed that the tourism industry has not performed well in any item, in relation to its importance to improving QOL.

Factor analysis reveals that tourism generally makes an economic contribution and demonstrates cultural understanding but does not effectively contribute to the communities, or the natural environments, which are first to incur the impacts. Furthermore, the responsibility and leadership needed for tourism to make these contributions is lacking. It is evident that tourism benefits, particularly economic and cultural, may accrue. However, negative impacts can deflate social and community domains, which jeopardizes sustainable tourism development and thereby improvements in the subjective well-being and QOL of host community members.

Based on the literature review, IP analysis and findings above, five research propositions emerge that could help inform future inquiry into the specific economic, sociocultural, and environmental aspects of tourism as they impact on the key attributes of QOL.

Proposition 1: Tourism development must be cognizant of local cultures and negotiate a means by which values can be represented in a way that recognizes and enhances QOL. Rather than repeating the work that has been done on host and resident attitudes toward tourism, further research should adopt a holistic understanding of culture to examine how culture works, what it does, and how impacts are negotiated and internalized when facing challenges and opportunities posed by tourism development.

Proposition 2: Tourism can only contribute to improved QOL if the specific economic benefits of secure employment, retained local business profits, and infrastructure development are distributed fairly in host communities. In addition, tourism can make a much greater contribution to the QOL in local communities through fair and equitable inclusion of local businesses and entrepreneurs in the development process. The work of Northcote and Macbeth (2006) and Dwyer et al. (2007) provide a useful starting point for reconceptualizing the concept of yield to incorporate measures of sociocultural and environmental impact. This notion of “sustainable yield” recognizes the triple bottom line effects of tourism (Elkington 1997; Dwyer 2005; Dwyer and Faux 2010). Following this line of argument, the central ethical question as to who benefits from tourism development, and how, should be subjected to further research in the contexts of QOL and desirable futures.

Proposition 3: Tourism must assume a leadership role in realizing the opportunities to improve QOL through CSR, new technology, and sustainable development in tourism destinations. Very few researchers are working in the area of CSR and tourism, and there is a lack of visible CSR practices in tourism (Tepelus 2010). There is a desire to see tourism play a role as a leading industry in this area, thus moving beyond the legally minimum requirements to actively contribute to enhanced QOL.

Proposition 4: Tourism is yet to recognize the essential importance of ecological sustainability with respect to both the ongoing viability of tourism destinations and the QOL of those who inhabit those destinations. The priorities for sustainable tourism development in the twenty-first

century were identified more than a decade ago by *Agenda 21 for the Travel and Tourism Industry* (World Travel and Tourism Council, the World Tourism Organization and the Earth Council 1995). These priorities provide a useful framework for investigating tourism and QOL issues and highlight the need to maintain the quality of the environment on which both the host community and the visitor depend. The results presented in this chapter suggest that more work is needed to better understand how QOL is influenced by the environmental restructuring that may occur as a result of tourism development.

Proposition 5: Tourism businesses, planners, and managers will need to consider how climate change, environmental damage, and natural disasters will threaten or enhance the QOL of local communities as well as travelers. A major challenge, and a substantial new research front in tourism, is concerned with how climate change and subsequent CO₂ reduction targets will impact on international tourism. Giddens (2009) captures the predicament of acting now for the future in the context of climate change. He argues that since few people are currently unduly affected by the outcomes of climate change, we fail to act. But when we are finally pressed into action by its consequences, it will be too late to do anything about them. While a number of scholars are examining the issue of climate change, there is clearly more opportunity to explore the nexus between tourism, the environment, climate change, and impacts on QOL.

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Part II
QOL from the Perspectives of Tourists

Chapter 8

Tourist Consumption Behavior and Quality-of-Life

Ruheet Genç

Introduction

In contemporary marketing strategies in service industries, the enhancement of customers' subjective well-being has gained importance. Through the consumption of satisfactory services and products, which are subjectively valued most of the time, in tourism and other service industries, tourists look for possibilities to enhance their subjective well-being and QOL. One of the essential qualities of tourist consumption behavior is that it is motivated, and it embodies subjective psychological processes which have emotional and personal meaning for tourists. In other words, tourists engage in tourism activities because they are driven by a need, want, or wish which call for gratification, and they make subjective meanings out of this gratification process. The particular needs of the tourist at the particular time of tourism choices and their psychological organization in general influence their decision-making processes.

It should be also taken into account that tourist decision-making processes and satisfaction from the preferred service is mediated by various individual characteristics. Such characteristics include demographic, psychological, and sociocultural factors. Demographic characteristics of an individual include variables such as age and gender whereas psychological characteristic of a person is most related to self-concept and self-image. Socioeconomic characteristics of an individual include his/her nationality and the culture he/she lives in. Paying attention to the different factors that influence tourist behavior, it can be stated that tourism experiences have the potential to influence psychological well-being of the tourists, which can be (and is usually) defined as QOL. In this regard, this chapter aims to investigate the dynamic interaction of different personal and social characteristics that are active during destination choice and tourism activity. In order to have solid picture, motivational factors, the essential types of tourist consumption behavior, and the dynamics of tourist satisfaction are mentioned as well.

In the contemporary world, tourism activity has become the fundamental means of escaping daily hassles and having a rest (Gilbert and Abdullah 2004). It has been suggested that holidays provide people with a socially appropriate fantasy space which facilitate their sense of freedom and provide an unconstrained experiential realm (Wang 2000). Today, tourism activities are

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considered “escape-aids, problem-solvers, suppliers of strength, energy, new lifeblood and happiness” (Krippendorf 1987, p. 17), and they have great potential to enhance the QOL of the individual.

For the purposes of the present chapter, the question to be posed is: “What is the relationship between tourist consumption behavior and QOL?” Tourism, incorporating a wide range of activities, can be conceptualized as a consumption process. For instance, a tourist engages in a decision-making process to choose a destination and arrange accommodation prior to the trip as well as plans his or her activities, chooses restaurants to eat, and buys souvenirs for friends during the trip. All of these activities embody material and nonmaterial aspects of tourist consumption behaviors. It should be taken into account that most of these choices and behaviors are influenced by the motivations of the tourists as well as these motivations determine satisfaction level of tourists which is an important concept that should be considered in order to understand the tourism consumption behavior.

Tourist Behavior and QOL

There is a consensus that tourism activities are important elements in the life of an individual: Involvement in tourism consumption has become a standard when one’s quality-of-life is evaluated (Richards 1999). In the last two decades, the meanings and functions of tourism consumption for QOL of tourists have been more thoroughly investigated. It has been demonstrated that people have the opportunity to engage in social interaction, to follow their interests, and to consolidate their identities through consumption of tourism services (Richards 1999). Individual characteristics that influence tourist behavior and tourists’ quality-of-life can be considered under four categories. These categories include demographic, psychological, social, and cultural characteristics of an individual (See Fig. 8.1 for an overview).

Demographic Variables, Tourist Behavior, and QOL

Age, Tourism, and QOL

In the tourist behavior literature, age is considered a significant variable that influences individual motivation for touristic activity, expectancies, and consumption behavior. As a major topic of research interest, tourist behavior in relation to the specific age group is investigated by different researchers, and children under ages of 12 are the youngest group which gets significant attention from researchers (Genç 2009). Pearce (1993) suggests that children have the potential of changing the preferences of their parents for destination places and their consumption behavior patterns during tourism activities. Tourism services that provide different alternatives for familial concerns such as activities which include all family members or special entertainment for children would more likely be the choice of tourists who are parents (Pearce 2005). Satisfaction of children needs from accommodation to entertainment may be another factor that enhances both parents’ and children’s subjective well-being and QOL in tourism activity. Not only the children would benefit from the services provided but also the parents who would see their children happy. They would feel more comfortable while taking care of the needs of their children, and they would have more time for themselves, which would probably result in more satisfaction and feeling better.

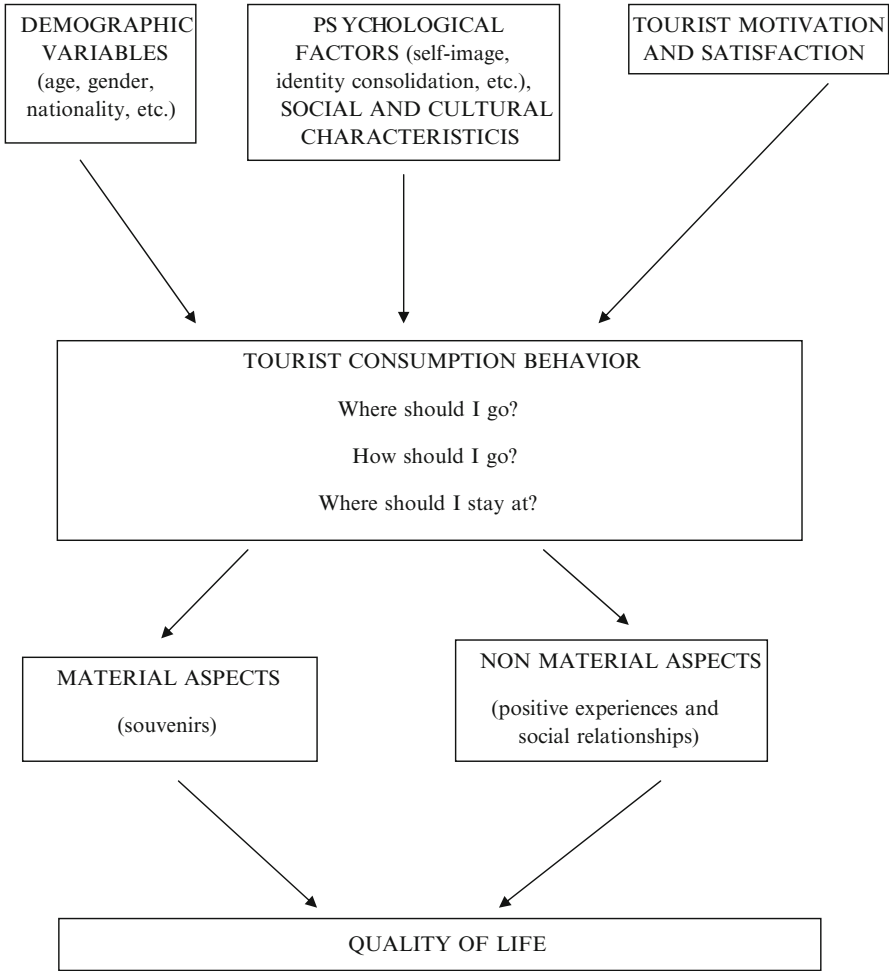


Fig. 8.1 Tourist consumption behavior and QOL

University students are another special group which has particular interests in tourism activities; as a result, their tourism choices can be significantly different from other tourist groups. Students generally engage in education-focused tourism activities which enhance their academic achievement as well as they arrange their holidays in regard to their academic schedule, like making use of spring breaks as sources of refreshment (Swarbrooke and Horner 1999). Academic improvement and increased sense of competence in education-focused travels would be the main desire for the former group. Taking a break in the dense academic schedule would increase positive feelings in the latter group, which leads to an increase in the motivation for academic work and a sense of well-being.

Older people have started to become another important group of tourists as their population increases in the contemporary world, especially in industrialized countries. Shaw and Williams (2002) state that old people prefer long-term tourism activities which would be less exhaustive for them. In this regard, tourism services and activities can be adapted to the needs of this group. Further research can also identify the specific needs of older people, and hospitality managers who aim to have advantages for the competition in the market can make use of these findings both to provide new services and to facilitate changes in the existing ones.

The Role of Gender on Tourism Activity

As in many of the other areas in the world, masculine point of view is dominant in tourism activities and places. A brief look into the tourism market would suggest that hotels, restaurants, night shows, “red light districts,” and nightclubs are mostly for men’s service. Traveling women are biased in the sense that they are related to the man next. Westwood et al. (2000) noted that a woman told in an interview that she is always assumed to be the secretary, wife, or mistress of the male next to her instead of an independent business traveler. Hospitality managers should be aware of these biases and aim not to reproduce them. Relating to the traveling woman as an individual on her own right would provide a more positive atmosphere for the woman tourist, increase satisfaction, and therefore result in positive evaluation about the services.

Shaw and Williams (2002) suggest that women prefer tourism activities which provide physical and mental relaxation as well as social interaction. Even though cultural norms enhance some activities such as shopping for women, and some other such as sports for men, Small (2003) proposed that older women who can get out of cultural norms of femininity have better holiday experiences than the others. These findings demonstrate that there would be major gender differences in terms of tourism preferences and satisfaction from the tourism activity. However, the issue should be considered in future research.

Nationality, Social Status, and QOL

It has been acknowledged that tourists of different nationalities engage in different consumption behaviors. For example, it is supported that Italians are the most social tourist group and French prefer adventure-oriented tourism (Pearce 2005). In this regard, it could be a good idea to take into account the nationality of the tourist groups to offer services which are most likely to enhance their sense of well-being. The relational patterns in the original culture, the tendencies, and preferences of the tourists should be considered in the service process. Even though they may appear minor, the details in the interaction process and the way the service is offered can create disturbances in the enjoyment, or they can increase the level of satisfaction and positive feelings.

Tourism behavior can also vary according to the social status of the tourist. First of all, social status is the basis for the distinction between various products and services (Rızaoğlu 2003). People usually tend to choose the destination, the accommodation, and the tourism services which they believe to be congruent with their social status. Hospitality managers need to take into account the social status of the tourists in order to offer distinguished and valued services. The tourists are likely to evaluate their experiences not only on the basis of what they see and what they are offered but also on the basis of what is omitted in the hospitality process.

Social status is also important if the hospitality manager aims to attract a specific group of tourists. Identifying and understanding of the socioeconomic profiles of the potential tourists are an important part of creating advertisements and developing publicity campaigns (Shaw and Williams 2002). On the other hand, people could wish to have the consumption patterns of upper social groups, and marketing strategies could make use of these desires (Genç 2009). Prior to the publicity campaigns, it should be thoroughly decided which groups of consumers are aimed: After this decision, it would be easier to come up with creative ideas which enable the activation of the desires and needs of the potential tourists.

Another influence of social status on the tourism behavior is that there are also differences in the same social group (Rızaoğlu 2003), and this fact needs special attention. Even though social status of the tourist influences the consumption behavior, it is not the ultimate determinant on its own right. For example, the size of the family or the number of working people may vary in the

members of a social status group (Genç 2009). The desires of a social group should be examined both prior to the visit; but the hospitality manager should be ready to come up with solutions in regard to the differences of the same social group. Enjoying the tourism activity is a micro-process which takes places within the individual and within the dynamics of the family. Industrialization of the tourism service is therefore impossible, and the ability to provide practical solutions to consumer demands is an important component of hospitality management. Tourism is a process in which the surrounding factors influence the individual, but at the same time, it is still the tourist who enjoys (or does not enjoy) the tourism experience.

Psychological Characteristics of Tourists and QOL

When the individual chooses a destination place to spend the holiday, she also chooses a social setting in which the consumption process will take place. In this regard, her evaluation of herself influences the destination choice; but at the same time as she consumes, she will be a part of social interaction and reproduce the social qualities. It should be taken into account that the tourist as an individual will also be an object in social contexts prior to, during, and after the travel. Wherever there is interpersonal interaction about the tourism experience, the tourist becomes an image in the social context. In this regard, tourism experience is an individual experience which appears in a social context and activates social interaction, and as a result, the main psychological process related to tourism revolves around the concept of self.

The literature provides practical information about the role of the self in the tourism experience. Beerli et al. (2007) point to 4 aspects of identity in consumer behavior research: These are how one sees himself and how he ideally wants to be, how one is seen by others, and how he wants to be seen by others. Every consumer behavior therefore includes a construction and reconstruction of psychological organization. When one consumes, there is the recognition and realization of a gap between the present experience and the ideal image which is projected into the future. As the individual changes his or her self-evaluation constantly, to which consumption contributes significantly, it can be argued that consumption behavior cannot be conceived as a fixed pattern.

In a similar vein, Ahuvia (2005) mentions that consumed services have two significant functions for the self: One is to express it and the other to transform it into a more idealized form. Through consumption of services, individuals may secure an expressive, comfortable, and desired identity in their lives. It is important to note that consuming services are both an individual and social phenomena which have repercussions for actual and ideal self-constructions (Sirgy 1982). Sirgy (1982) mentions that individuals consume services which are congruent with their identities that provides a space for psychological development and self-presentation in the social domain.

Hong and Zinkhan (1995) showed that consumption processes can be influenced by actual and ideal self-definitions of the individual. This finding can be applied to tourism settings in the sense that these definitions mentioned can have an impact on the type of vacation and destination choice (Beerli et al. 2007). It has been demonstrated that when tourists visit places which are congruent with their self-definitions and if these places help them consolidate their identities, they are likely to be satisfied with the destination (Chon 1992). In that sense, it is important to carry out a process in which a well-match between the self-image of the tourists and what tourism product they consumed is made (Sirgy and Su 2000).

Litvin and Goh (2003) look for the association between destination image/self-image and destination image/ideal self-image congruity with a cross-cultural sample. Results indicate that the congruency between destination image and self-image is correlated with visitor satisfaction.

In addition, they put individualism/collectivism dimension as a moderating factor between self-image and destination image. It is supported that people from individualistic cultures such as West Europe report more satisfaction if the destination image is individualistic. These findings suggest that cultural factors are important elements which contribute to the construction of a self-image. As another example how self-image influences the choices in tourism, Lopez-Bonilla and Lopez-Bonilla (2009) talk about the “postmodern tourist” who is especially different in the sense that she does not rely on travel agencies for the holiday and prefers new places instead of old ones. Postmodern tourist is different as she does not prefer traditional ways of enjoying a holiday; but still, the postmodern quality of experience enables a relatively coherent identity to flourish, which is marked by the constant desire for new experiences in new areas. Similarly, Curtin (2010) notes that tourists who seek experience in wildlife tend to see themselves different from other tourists. From these examples, it can be concluded that how one sees oneself is a crucial determinant of tourism activity. How one sees himself or herself in relation to others results in the different expectations in tourism activity. The tourists can expect a destination image consistent with his ideal self-image, or he can attempt to express his individuality and difference in his tourism choice.

Postmodern approaches highlight the dynamic links among what is consumed, who is the consumer, and what the consumption process is like (Ahuvia 2005). Ahuvia (2005) mentions that consumption of services and products in the contemporary world grants individuals an opportunity to construct and consolidate a consistent identity and to explore themselves. What people like to do, where they go, with whom they spend their time, and what they own help them to define their selves as individuals (Belk 1988). People in contemporary world are inclined to strengthen their identities through their behaviors, and consumption is thought as a form of verification of the identity (Litvin and Goh 2002).

Interestingly, from their interviews with tourists in a national UK park, McCabe and Stokoe (2004) concluded that tourists tried to present their visit as “natural,” as if it is something that separates them from masses and sets them as individuals. The interview shows how important the authenticity factor in tourism has become. Tourists aim to make meaning of their experience as a “real” event, not a constructed and predetermined scenario which has been influenced by the market and advertisement. All of these findings and narration support the idea that consumption behavior means more than the gratification of certain needs; instead, it has become a form of self-expression and contributes to construction and validation of the self.

In this sense, a hypothetical young man from Western Europe, visiting India in order to know better the Indian culture, provides a good example. He reports that his ideal self includes being more spiritual than people from his own culture. His tourism experience includes self-expression and verification of self-image and identity. He would feel satisfaction, happiness, and calmness as a result of his tourism experiences, and it would be an experience for him unique to that place and time. The support for such cases is evident in the literature. Belk (1988) noted that activities, services, and products which have defining roles for one’s self-image involve positive emotional meanings for the individual. He highlights that by consuming these services and products, feelings of satisfaction, compassion, and loyalty gain importance. Similarly, different studies suggest that when people are asked to think about those possessions and services they feel emotionally attached, they tend to report feeling happy and compassionate (Schultz et al. 1989). In this sense, it can be suggested that tourism choices as indicators of self-image are evaluated and valued in subjective terms.

Even though contemporary postmodern world enhances different identities, different experiences, and different consumption behaviors, there are still commonalities. From their ethnographic study with the Israeli backpack tourists who go to India for spiritual experience, Maoz and Bekerman (2010) concluded that there is not a solidly distinct difference between the religious tourist, pilgrim, and the recreational tourist. In the postmodern world, people can make various

meanings of the same experience and can identify themselves with those different meanings. In the contemporary world, even death and disaster-related experiences can be constituted as a tourism experience, which is categorized under the label of “dark tourism”; Stone and Sharpley (2008) offered that this kind of tourism enabled the tourist the reconstruction of an individual meaning system to contemplate mortality and existence.

Another important factor that influences the tourism experience and satisfaction is the self-consistency motive. This motive leads the tourists to look for tourism products and services which have consumer profiles similar to themselves. Sirgy and Su (2000) stated that social and demographic factors along with psychographic characteristics of tourists are involved in the formation of their self-images and making of tourism decisions. For instance, a tourist who defines himself as environmentally sensitive is likely to choose destinations which are known with their natural beauties and magnificence. It can be suggested that by consuming self-consistent tourism products, tourists secure their identities, consolidate who they are, and reduce psychological discordance.

Among other motives mentioned by Sirgy and Su (2000) involve social impacts of tourism consumption behavior on the life of tourists. The authors mention that social consistency and social approval motive, which are influential in tourism consumption behavior, in turn influence one's identity formation process and QOL. Social consistency motive lays emphasis on how an individual is viewed by others in the social domain. Tourists also tend to maintain their self-image in the eyes of others consistently and consume tourism services in accordance with it. Similarly, social approval motive leads tourists to make consumption decisions which will be accepted by their reference groups. In this sense, an example of reference groups tourists can look for approval can be socioeconomic class. For instance, Schiffman and Kanuk (2004) mentioned that upper-middle class tourists are likely to prefer popular destinations and accommodate in luxurious hotels. Tourists who belong to upper-middle classes take consumption choices such as this as reference points in their own decision making. In that way, their social image is kept consistent and approved by other members. On the basis of these findings, it can be asserted that tourist consumption behavior is both an indicator and a regulator of one's social standing. Through making consumption choices in tourism activities, tourists consolidate a social image in the eyes of others which grants them a sense of acceptance and belonging, facilitating their psychological well-being and QOL.

Social Characteristics

Up to now, it has been noted that individuals pay attention to the way they exist and how they are perceived in the social context. They prefer consumption behaviors which are congruent with these ideas and ideals they have about themselves. In addition, they want to be around those who they perceive as similar to themselves. These are some important examples of the relationship between the social context and psychological processes and behavioral outcomes.

In addition, people feel themselves connected to different social groups, and they may aim to show, both to themselves and to others, that they are in harmony with a group through their consumption choices (Moore et al. 2005). In this sense, QOL of the tourists is likely to increase when they feel they strengthen their social bonds. Being in an appropriate interaction with those who the individual feels attached to is an important aspect of everyday life; therefore, its reproduction in the tourism experience will increase the likelihood for satisfaction. Providing social benefits in addition to individual pleasures from tourism activity is a type of behavior most tourists are likely to engage in. Such social benefits may include an increase in the self-esteem, positive evaluation of the social group and context the individual belongs to, and a more optimistic projection about the future. As a result, offering services which are congruent with the social influences on the tourist is an important task that the hospitality manager has to deal with.

Cultural Characteristics

Cultural background of the tourist influences the tourist both prior to the tourism activity and during the tourism experience. Values, attitudes, and norms, which can be considered the main elements of the culture, have an impact on the type of tourism activity the tourist tends to choose. On the other hand, the evaluation of the tourism experience by the tourist is influenced by the cultural factors. First of all, the level of openness to different cultures is an important factor in the way the tourist interacts with other people in the destination place. The individuals who are extremely ethnocentric (who believe that the norm of the culture he lives in is the norm) or prejudiced about other cultures are likely to have lower levels of satisfaction.

How the tourist would evaluate the quality of interaction is also an indicator. An individual from an individualistic culture can see daily interactions of collectivist cultures as transgressions and violations of personal boundaries. However, it can also be the case that another individual from an individualist culture can feel friendly and close to those who are not paying extreme attention to the clearly defined interpersonal norms. On the other hand, people from collectivist cultures can view individualistic patterns of manners as indicators of arrogance. Another individual can feel relaxed as a result of enjoying the sense of being on his own and peace.

Tourist Motivation

Along with psychological, social, cultural, and demographical factors, motivation for tourism activity is conceptualized as a step for expectation formation which provides satisfaction from tourism experiences. Gnoth (1997) states that expectations of a tourist are extremely important because it is influential on choice processes and perception of experiences. In addition, at the time of tourism activity, tourist expectation forms basis for satisfaction. Del Bosque et al. (2009) suppose that the factors which influence tourist expectation reside within the experiences of the individual and image of destination places.

The motivation theories usually have the common conceptual framework which assumes that tourist motivation depends on the balance between personal characteristics, needs of individual, and social/conditional circumstances (Pearce 1993). One of the early motivation models is Isa-Ahola's (1980) intrinsic motivation model for tourist behavior. It provides structured general themes to understand tourist motivation with an emphasis on underlying dynamics: According to the model, main motivation for tourism activity stems from leisure needs of an individual which are shaped by social and conditional factors.

Another model proposed by Cohen (1978) specifies bidirectional need spectrum that determines motivation for tourism activity. In this model, curiosity for new experiences locates at the one hand whereas fear of new experiences is at the other. This model points out that tourism activity may affect quality-of-life adversely if fear dimension is predominant for the individual.

Another approach to motivational aspects of tourist behavior suggests that travel and tourism activity for an individual is a product of being "pushed" by internal factors or being "pulled" by tourism destination properties (Dann 1981). Push factors are considered as internal and had more affective components whereas it is suggested that pull factors are associated with external factors such as special aspects of destination places (Yoon and Uysal 2005). Within this framework, it is argued that an individual is pushed by internal factors if he/she prefers to engage in touristic activity for relaxation and resting purposes. On the other hand, it can be suggested that another individual who travels in order to see ruins of an ancient civilization is pulled from external factors. In addition, a casual relationship between loyalty and motivation is pointed by Yoon and Uysal (2005): They argued that loyalty to a destination place increases the motivation of the individual

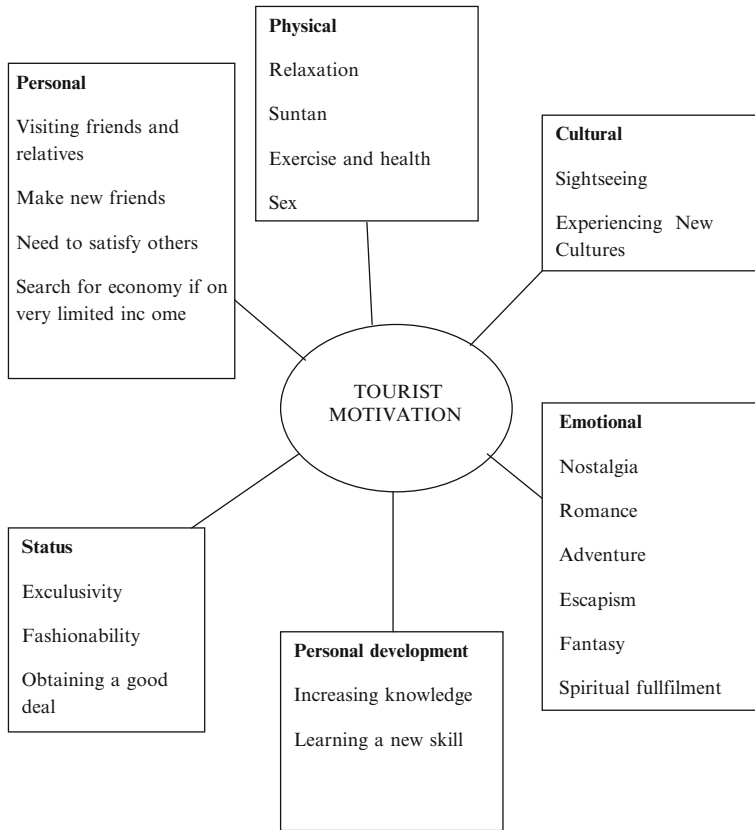


Fig. 8.2 Elements of tourist motivation (Swarbrooke and Horner 1999)

for tourism activity specifically at the chosen destination. This motivation is related to push factors rather than being related to pull factors. The loyalty to specific destinations, motivation, and tourist behavior association are new topics in tourist behavior, and they can be fruitful areas for further research. At the same time, these associations have valuable implications to have a better picture about tourist behavior, motivation, and quality-of-life.

Swarbrooke and Horner (1999) propose a more comprehensive model that emphasizes the uniqueness of individual experiences. They mention two types of motivators in their model: The factors that lead a person to make a touristic activity are the first type. These motivating factors are discussed under six categories: cultural, physical, emotional, personal, personal development, and status. As an example, it can be said that different alternatives lead an individual to go on a holiday or touristic activity for relaxation purposes, for self-development purposes, or for visiting a friend (for details, see Fig. 8.2). In addition, the individual factors which have a major influence on tourist motivations are personality, life-style, past experiences related to tourism activity, past life incidents, perceptions of one's strength and weaknesses, and self-images. It is supposed that the motivators may change in time parallel to change in life circumstances: Having a child, worsening health, and changing in economic income are considered examples of factors that influence motivators (Swarbrooke and Horner 1999). In this regard, an outgoing individual from middle class who used to travel to the destinations popular for its sea-and-sand and night-clubs can have changes in his motivations to have a tourism activity. It is possible that after having a family and child, this individual can look for an economical quiet destination place in which the family relations will be consolidated via nature walks, beach activities, and rest.

Tourist Satisfaction

Satisfaction is the process through which the increase in subjective well-being is identified and understood by the individual. It can be suggested that satisfaction is the natural result when one concludes that he or she is feeling better than prior to the travel. However, the definition of satisfaction is not clear: Drawing from an extensive survey, Giese and Cote (2000) proposed three elements of satisfaction: affective response related to tourism activity, evaluation of product service, and expression before and after choice of destination places. Some researchers have applied customer satisfaction theories to tourist satisfaction research. It is suggested that the attributes of the destination constitute a significant element of tourist satisfaction as well as dissatisfaction, as in the example of consumer satisfaction in many case of consumption instances (Pizam et al. 1978). In this regard, Rust et al. (1995) claim that overall impression of a tourist should be investigated in order to understand different dynamics of tourist satisfaction.

Recently, cognitive-affective nature of tourist satisfaction is recognized by many researchers; it is hypothesized that not only cognitive aspects of satisfaction such as expectations, beliefs, and attitudes but also affective experience of tourist play significant roles in tourist satisfaction level (Oliver and Westbrook 1993). Del Bosque and Martín (2008) have conducted a study that investigates various cognitive-affective factors that influence tourist satisfaction. The results indicate that the image that was founded prior to the trip has significant effects on expectations and loyalty, and this further implies that tourist destination image is effective on choice processes. In addition, it is demonstrated that the image is not associated directly with tourist satisfaction, rather expectation mediates between destination image and tourist satisfaction. Secondly, positive expectation has positive significant effect on tourist satisfaction. Individuals rely on destination image and past experiences in terms of expectation formation which is directly and significantly associated with tourist satisfaction. Third argument is that emotions are important for both beliefs prior to the travel and post-experiences evaluation. The capability to gratify the needs of tourists in the destination place is a significant predictor of satisfaction and enhancement of positive emotions. Positive and negative emotions at the time of tourism experiences are highly influential in satisfaction formation since the enjoyment of the tourist depends on their subjective experiences. The findings of the study are in harmony with previous literature on tourist satisfaction. Moreover, importance of emotions on tourist satisfaction is highlighted from a cognitive-affective model. Another important outcome of the study is that tourist loyalty is highly influenced by tourist satisfaction (for details, see Fig. 8.3). Earlier in the literature, Oliver (1999) supposed that loyal consumers would experience high levels of satisfaction, but he notes that it is hard to

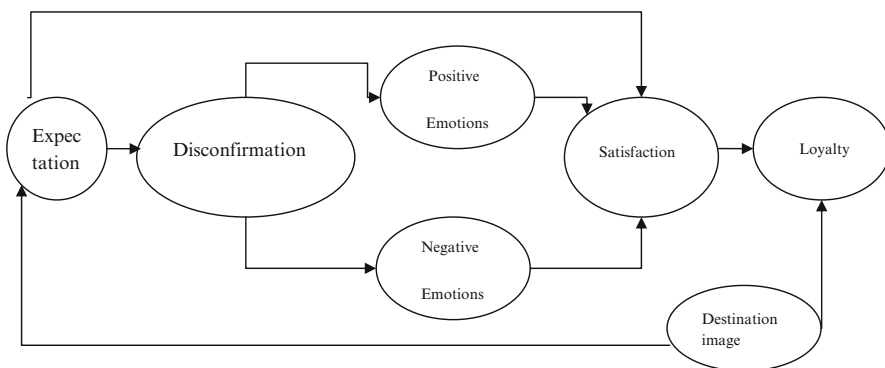


Fig. 8.3 Estimates of a cognitive-affective model (Adapted from Bosque and Martín 2008)

indicate that satisfaction is always a precursor of loyalty. Genç (2009) proposes that sociocultural conditions, attitudes, and tourists' past experiences are different aspects that influence the association between satisfaction and loyalty.

Material and Immaterial Aspects of Tourism and QOL

The ways tourists benefit from tourism experience include both objective and subjective means. In the subjective sense, tourism activities are viewed as an escape from daily hustles and stresses in contemporary world. It has been noted that tourists find an opportunity to relax and to get away from their daily routine lives during the consumption of tourism services and products. In the literature, it has been also demonstrated that having a holiday influences the subjective well-being by facilitating positive feelings which endure after the holiday is over (Gilbert and Abdullah 2004). Similarly, Neal et al. (2007) state that by granting tourists with a sense of satisfaction, these tourism activities potentially improve their QOL. They mention that a state of satisfaction can turn into a more stable mood state of happiness by accumulation of gratifying experiences and thus, abolish psychological stresses one faces with in life. Instead, tourists can attain a more relaxed and happy state through ongoing impact of gratifying tourism consumption in their lives (Neal and Gursoy 2008).

Consumption of tourism services provides socialization opportunities for tourists both among themselves and with different cultural groups (Galloway 2008). Cultural tourism particularly has been on the rise among tourists who want to meet with different cultures. As an example of the cultural factors in tourism, Yeoman et al. (2007) showed that authenticity plays as a key role for Scottish tourism market and evaluated how it could be provided for the visitors. Tourists engaging in cultural tourism activities and consuming local products find a way to learn different perspectives on matters in life. Gaining flexibility and tolerance may be a psychological side effect of the social interaction taking place in cultural tourism settings. Therefore, tourist consumption behavior may improve one's subjective well-being through providing social conduct and meeting with differences in the tourism destination.

Souvenir consumption is another type of consumption behavior which potentially influences QOL. Souvenirs materialize the tourism experience: In a way, it summarizes the destination place. In addition, it enables the memory of the tourism experience to be accessed more easily: One of the reasons that tourists frequently enjoy buying souvenirs from destination places is to remember the enjoyment they had during their trip. It should be kept in mind the material existence of the souvenir also has a social meaning: Through the possession of souvenirs, tourists prove to others, as well as themselves, that they have been in the destination place.

Research suggests that tourists are motivated by different levels of willingness to buy souvenirs (Swanson and Horridge 2004). It has been demonstrated that tourists who generally tend to buy local products are motivated to engage with the inhabitants and culture of the destination place while those who travel for the purpose of outdoor activities are less likely to engage in souvenir consumption (Litirell et al. 1994). As the tourist walks around to buy souvenirs, he or she is likely to talk to the sellers who are probably from the host community and negotiate about the price. The souvenir is meaningful to the tourist only if he or she finds a meaning or a quality to remember in the destination place. For the tourist who is engaged in outdoor activities, instead of the cultural context, what is likely to be important is the activity opportunities provided by the destination place.

Recently, tourism services have come to be viewed as a nonmaterial commodity whose value is influenced by interpersonal aspects. In this regard, Trauer and Ryan (2005) argued that the quality of the relationship between visitors can even act as the primary determinant

of the quality of tourism experience. In this regard, providing a positive atmosphere in which the visitor can freely interact becomes an important element of hospitality management. Clarke (2008) addresses the experiential aspect of tourism services and highlights the modern uses of travel packages or tourism activities as gifts. He emphasizes the sense of common sharedness accompanying experiential gifts such as trips to a particular destination place, and he discusses the role of this quality of sharedness in the formation and sustenance of interpersonal relations.

Clarke's (2008) thoughtful discussion on tourism services as experiential gifts suggests that the concept of tourist consumption behavior has expanded. Through the consumption of physical and psychological aspects of tourism services, QOL of tourists could be enhanced by a variety of ways: One has been mentioned by Clarke (2008) that the facilitating impact of these services in the social and interpersonal domain enhances one's sense of well-being and QOL.

Conclusion

The present chapter reviews factors which influence tourist behavior and tourist quality-of-life. The interaction between individual characteristics and the sense of quality-of-life is considered together in order to delineate the relation between tourism, personal characteristics of a tourist, and quality-of-life. In tourism industry, the range of customer characteristics is wide. The age of tourist is influential at the date, length, and type of destination services. Gender is considered as an important variable that affects the choice of tourists. It should be considered that the satisfaction of women from tourist activity and sense of QOL increase if the biases toward women in destination places decrease. The socioeconomic class and nationality of tourists have also effect on tourist choice behavior. People try to stay in their own class norms and be socially approved. The tourist behavior and evaluation of tourism experience are highly influenced by one's own culture.

The psychological aspects of tourist behavior and its relation to QOL are discussed in detail throughout the chapter. The self-image of an individual is expressed and verified in tourist consumption. People do not always make consumption choices according only to their self-image but also to their self-ideals. The congruence between one's self-image and destination image seems to play an important role in destination choice process. It is easy to see that tourism has great potential to enhance the quality-of-life of individuals via psychological means.

People have the tendency to choose destinations or touristic services in accordance with their self-concept. In addition, social image that a person holds influences indirectly his/her touristic behavior choice. The underlying motives of choice behavior are generally detected as being socially approvable and socially preferable. On the other hand, motivations and expectations of the individual tourist influence preferences as well as the satisfaction. The material exchange during touristic activity such as souvenir consumption and the nonmaterial experiences such as positive interpersonal interaction are other processes which contribute to quality-of-life. All these factors, which are consolidated with the psychological background of individual and service-related stimuli, lead to a specific type of tourism activity. This activity, in turn, verifies and validates these underlying self and social images. Therefore, tourism indirectly increases the sense of well-being, as well as the quality of their life. As tourism enables escaping from daily hassles, relaxing, and establishing social interaction, the increase in the QOL of the tourist emerges during tourism activity.

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Chapter 9

Subjective Aspects of Tourists' Quality-of-Life (QOL)

Ruhet Genç

Introduction

Tourism industry is a crucial part of service industry where the customers' needs and preferences gain prominence. In contemporary world, views and wants of the customers has become the driving force of the services and products offered in the tourism industry. In the tourism context, hospitality managers provide services to customers with an aim of increasing their satisfaction, enhancing their positive feelings, and facilitating their overall well-being of tourists.

Contemporary marketing strategies of service industries in general and tourism industry in particular basically reside on the well-being dimension of customers. Kotler (1986) argued that marketers should understand the "needs, wants and interests" (p. 16) of customers and provide them with services which focus on customer satisfaction, contentment, and well-being better than their competitors. He suggested that the extent to which marketing activities support the well-being of consumers influence marketing effectiveness.

The diversity of consumers and the complexity of the consumer satisfaction concept have been acknowledged in recent years for the marketing attempts in the hospitality industry. Sirgy and Samli (1995) asserted that satisfaction of customer needs is not sufficient for effective marketing of services and tourism products. In their account, keeping the mind the different dimensions of subjective well-being, an effective service marketing strategy should support at least one dimension of subjective well-being.

In the era of consumer satisfaction and well-being, the concept of quality-of-life (QOL) has the potential to be central in the tourism industry. Although QOL is conceptualized on different grounds, it has infiltrated into the tourism context with an emphasis on "customer-focus" and "the guests' well-being and subjective experience."

The link between tourism experience and individual QOL has been gradually consolidated and delineated. In conceptualizations of the term QOL, tourism activities have come to be included. World Health Organization identifies "involvement with and chances of vacations and tourism activities" as one of the dimensions QOL assessment (Richards 1999). In several countries including UK, New Zealand, Canada, and the USA, steps are taken to make use of tourism activities for enhancing tourist QOL (Galloway 2008). Besides, research demonstrates that

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tourism activities have a facilitating effect on individual QOL. A survey carried out by Hilton Hotels Corporation in 1995 shows that 81% of participants have a better view and sense of life in general toward the end of their travels (Richards 1999).

Tourism activities have various points of intersection with individual QOL. Vacations may help people to find an opportunity for communicating with others, for consolidating their preferences and identities, for enhancing their personal growth, for engaging in activities they like, and for satisfying their social, cultural, and personal interests (Richards 1999). As these intersection points like identity formation implies, the concept of QOL is a highly subjective construction. People interpret and make meaning out of travel and tourism experiences through their individual lenses. It should be noted that not only QOL is influenced by the tourism experience, but QOL itself also plays a dominant role in the subjective evaluation of the tourism experience. Passing through this subjective lens, leisure and travel turns into a facilitating experience for the individual QOL.

All dimensions and features of a service or product in the tourism industry intersect with the individuals' personal characteristics and ways of seeing the world. Understanding these subjective processes is vital for the tourism industry since, as Sirgy (2001) suggested, these insights illuminate designs of services or products which can function as a facilitator of QOL in customers' lives. The present chapter will dwell on the subjective determinants of QOL in the tourism context. Tourists' cognitions, emotions, personality structures, and relational experiences in the destination place will be discussed as significant subjective determinants. Before going into an in-depth discussion on the topic, main concepts will be briefly introduced.

The Conceptualization of QOL

The Definition of QOL

There is diversity and ambiguity in defining the term QOL. Over a hundred definitions have been provided in the literature, yet the QOL concept is still far from a clear formulation (Costanzaa et al. 2007). The difficulty with providing a clear definition partly stems from the fact that the concept is widely and inconsistently used, partly from the belief that the concept cannot be formulated exactly (Galloway 2008). Awad et al. (1997) suggested that through studying on different variables and constructs leads to different definitions of quality-of-life.

A brief look at the frameworks by which QOL is defined helps to have an idea on what the concept is all about. These frameworks can be outlined as the normative view which highlights normative ideals of pursuing a satisfactory life (e.g., helping others according to religion), the preference satisfaction view which emphasizes the extent to which a service or product satisfies the customers' needs, and the subjective experience view which prioritizes personal evaluation, perception, and experience of the consumer regardless of a normative standard or personal need (Diener and Suh 1997).

As the definitions above indicate, the QOL concept can vary along objective and subjective, normative and individualized dimensions. Since the focus of the present chapter is "the subjective side" of the QOL concept, it needs to be clarified. Subjective QOL is a broad umbrella term that covers happiness, subjective well-being, and satisfaction with life (Sirgy 2001). Studies on subjective QOL focus on personal experience and perceptions about one's life quality. Sometimes, the term is used interchangeably with "subjective well-being" of individuals in the literature (Costanzaa et al. 2007). Neal and Gursoy (2008) provide a comprehensive and plain definition for subjective QOL and define it as *the consumers' perception of and satisfaction with his/her overall life*. A brief review of QOL measures will make the objective-subjective distinction more explicit.

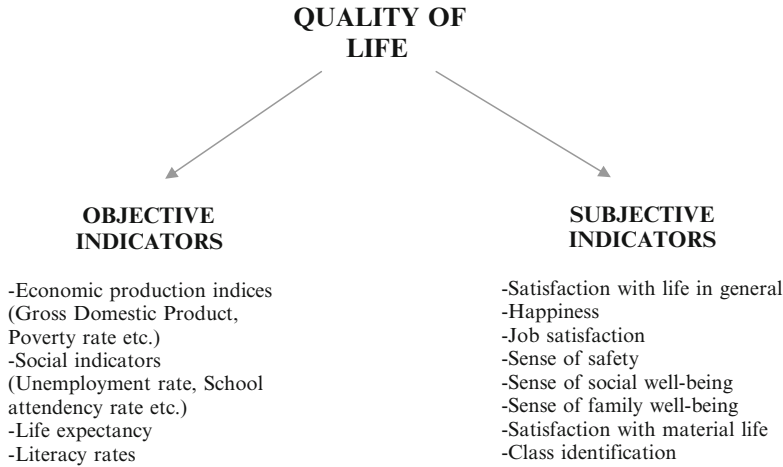


Fig. 9.1 Objective and subjective measures of QOL

Quality-of-Life Measures

There are two main approaches for measuring quality-of-life: Objective and subjective. These approaches imply a different conceptualization and understanding of the concept. The distinction between subjective and objective measures of QOL is made on the basis of their relation to customers' "subjective awareness" (Veenhoven 2002, p. 2). Objective indicators are not much subject to awareness of tourists and guests. For example, income level of an individual does not change in accordance with his or her perception. However, as the name implies, subjective indicators of QOL are directly influenced by perceptual differences and subjective evaluations (Costanzaa et al. 2007; Galloway 2008).

Below, objective and subjective measures of the QOL concept have been summarized. (see Fig. 9.1).

Objective Measures of Quality-of-Life

Objective measures of QOL utilize quantifiable social, economical, and health-related factors, such as GDP per capita and life expectancy rates (Cummins 2000). These measures provide a more reliable and valid assessment of the QOL concept and offer a more bias-free, objective understanding. They can also be utilized to make local, national, and geographical comparisons and to broaden the scope of measurement devices (Diener and Suh 1997).

Objective measures of QOL have become a traditional method and found widespread appeal in assessment of diverse populations varying in age, sex, life conditions, etc. (Costanzaa et al. 2007). However, these measures have been criticized on several grounds. One critique of the method highlighted that numerical results provided by these objective methods are hard to interpret and report (Cummins 2000). Another critique is that these measures do not capture the diversity and complexity of consumers' subjective and individualized experiences, thoughts, and perceptions (Costanzaa et al. 2007). The attributions of the individuals to their quality-of-life includes highly personalized thinking processes, thus, objective measures are not sufficient to explain the concept. This criticism brings the issue of subjective measures to the fore.

Subjective Measures of Quality-of-Life

Subjective measures of QOL assess the personal life experience of individuals within social, economical, and health-related domains, and they utilize subjective indicators such as happiness or subjective well-being, taken by valid and reliable self-reports (Costanza et al. 2007; Diener and Lucas 1999). Subjective measures of QOL focus on the extent to which a service or product make individuals feel satisfied. Researchers make use of open-ended questions such as “How satisfied are you with your life as a whole these days?” in order to capture one’s subjective evaluations about life (Schwarz and Strack 2003, p. 61). These measures focus on consumers’ individualized point of view and capture the diversity of consumer experiences.

However, subjective measures of QOL have also been subjected to criticism. Sirgy (2001) outlines several of them. The first one is that self-report measures risk the possibility of providing invalid and unreliable results which does not reflect the real experiences of tourists. Another critique is that individuals are likely to respond more positively than they would normally do in order to be more socially desirable in a socially desired manner in self-report measures which is called social desirability bias in the literature. Thus, subjective measures may not provide a realistic picture of consumers’ subjective experiences; instead, they may reflect socially expected standards and normative information (Genç 2009, 2011).

Subjective Aspects of Tourist’s QOL

The conceptual definitions provided at the beginning of the chapter implicate that the concept of QOL is a highly individual and personal construction. QOL is an intricately linked concept with an individual’s life experiences and personal meaning making. Locating the QOL concept within an individual’s subjective experiential realm, the link between QOL and tourism industry can be reexamined.

More recently, Sirgy (2001) added to this conceptualization a time framework. In Sirgy’s account, affects and cognitions are experienced within a given time period. They either subside within a short time, or they are sustained. In their daily lives, people may experience several negative or positive affects and cognitions for a short time (Sirgy 2001). For instance, if an individual feels angry as a reaction to a temporary conflict, his/her anger cools down within a short period after the resolution of this conflict. Sirgy (2002) suggests that the accumulation of feelings makes people have more enduring negative or positive affective and cognitive states, such as happiness or depression in the long run (see Fig. 9.2).

For understanding the subjective determinants of QOL in the tourism context, affective and cognitive components of the term need to be explored in detail (Genç 2009, 2011).

The QOL concept is formulated and influenced by who the customer is, how he/she feels and thinks, how he/she evaluates a life situation, how he/she relates to the world, and what personality traits he/she has. Therefore, it is necessary to examine the QOL concept in the tourism sector through a subjective lens. In the rest of the chapter, cognitions, emotions, personality, and relational experiences are discussed as subjective determinants of the QOL concept in the tourism sector.

Personality and relational experiences are added to cognitive and affective components of QOL for one reason: Individual tourists are more than positive and negative cognitions and affects. Tourists, having integrated psychological capacities, experience complex processes for achieving high QOL. Therefore, a more comprehensive evaluation of the tourists’ subjective experiences is required to capture the complexity of tourism-QOL link.

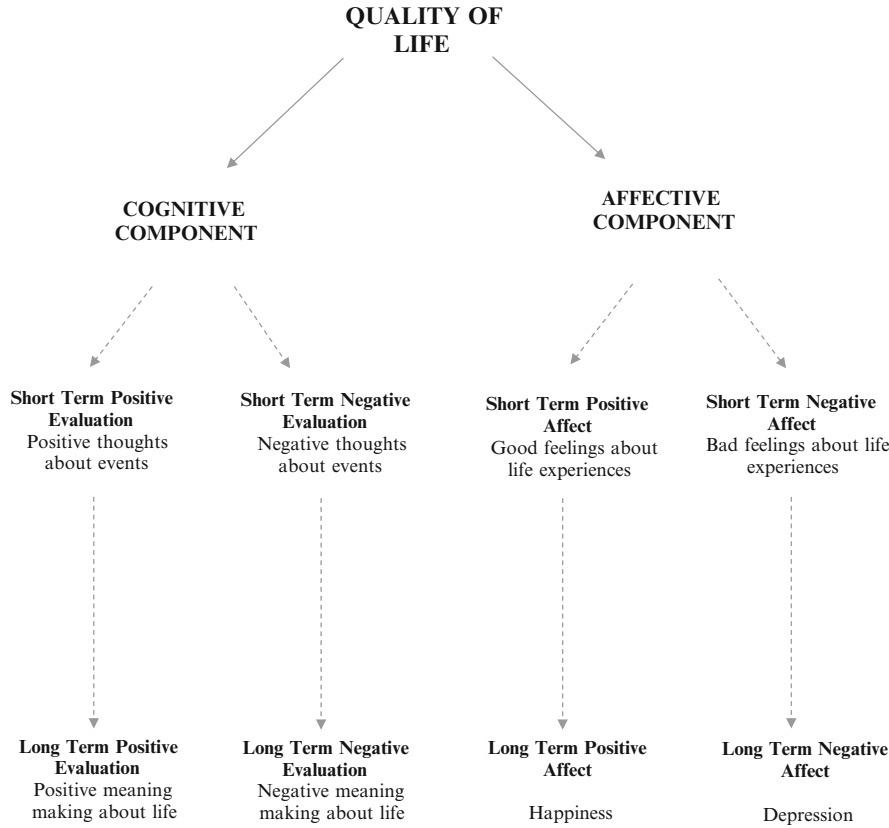


Fig. 9.2 Affective and cognitive components of QOL in the short and long run (Source: Sirgy (2002))

Cognitive Dimension: Cognitions as the Subjective Aspect of Tourist QOL

What Are Cognitions?

Cognitions are defined as thoughts and thinking processes (Taylor 2005), and they are thought to develop by dynamic interactions between genetic, biological factors, and environmental experiences. In the formation of cognitions, experiences in one's social and physical environment are vital for shaping the effects of genetic makeup (Taylor 2005). People construct their cognitions, including thoughts, evaluations, and meaning-making processes, on the basis of what they learn from their previous experiences and what they store in their memories (Goodson 2003). Therefore, prior experiences are recorded and transformed into representations which shape one's way of seeing things in life.

Cognitions have different functions in an individual's life. Since cognitions occupy a wide range of activities and processes, their functions vary accordingly. For instance, short-term memory, being a vital aspect of the term cognition, provides the individual with a sense of awareness of the environment and constitutes the underpinnings of consciousness (Oakley 2004). Another aspect is long-term memory which makes it possible to encode one's prior experiences and

sustains a continuous sense of identity. Cognitions also have integrative functions by which prior knowledge and experiences stored in short- and long-term memories can be retrieved and utilized in real-life circumstances (Goodson 2003).

Cognitions may also function as evaluative and interpretive thoughts which frame individuals' way of seeing the world. People make sense of their environment and respond to new occurrences by utilizing earlier memories and related thoughts, attitudes. By this way, formerly constituted cognitions enable an adaptive response in a new situation the individual has not encountered before (Morra and Gobbo 2008). For instance, a cognition stating that "people should be expressive and friendly in unfamiliar social environments" helps a newcomer to adapt to and socialize in his/her new school or university and form good social relations.

Sticking on the view that life is compromised of multiple domains of experience, cognitions regarding one's self and others, social environment, family life, and the like operate in individuals' interactions with the world. These cognitions shape how an individual evaluates and feels about a current situation or event. Therefore, cognitions can be organized around different domains of activity, knowledge, and experience (Taylor 2005).

Understanding how cognitions develop and operate in one's life is significant for tourism context. As Veenhoven (2002) points out people's personal ways of experiencing the world needs to inform practical steps taken to facilitate QOL in all sectors. In the tourism industry, cognitions are significant for several reasons. For one, people's cognitions are involved in the perception and evaluation of services and products they consume. Second, travel-related cognitions go through the same processes of formation. Third, knowledge of how cognitions develop may prove useful in tourism industry to identify points of interference in ameliorating tourism services and products. Therefore, it is necessary to understand how cognitions develop and operate in the tourism context in order to enhance the tourism sector.

For the purposes of the present chapter, three features of human cognitions are especially relevant which will be briefly explained. These may be outlined as:

- Accumulation of experiences
- Dynamism and openness to change
- Excitation of feelings

As mentioned above, cognitions are the ultimate outcome of previous experiences. They can be thought of as an envelope which contains and packages earlier processes. All elements of cognitions are abstract inferences derived from former occurrences, relations, and early memories in life (Oakley 2004). I am suggesting that within the tourism context, experiences of tourists in all tourism activities like transportation, accommodation, and entertainment are stored, processed, and transformed into tourism-related cognitions via abstraction. These cognitions shape the meaning of the tourism activity in an individual's life and alter the way in which an excursion is anticipated to be like. Therefore, the accumulation of prior experiences within cognitions has significant repercussions for the tourism industry.

Although cognitions function as the container of one's domain-specific interactions in the environment, they are not static snapshots of life experiences (Taylor 2005). Cognitions, being flexible and open to alterations, are formed and transformed throughout life. Thus, all cognitions have the potential to change in order to incorporate new occurrences (Wright et al. 2006). Within the tourism context, dynamism and flexibility of cognitive elements are promising, since this makes it possible to improve travel-related cognitions by offering satisfactory experiences.

One feature which makes cognitions a powerful force in leading life decisions and meaning-making processes is that cognitions generally trigger a particular emotion (Wright et al. 2006). For instance, a cognition stating that "the world is uncontrollable and unpredictable" is likely to be associated with feelings of anxiety and panic, whereas thinking that "the world is predictable in some respects and unpredictable in some others" may facilitate feelings of comfort and agency

(Wright et al. 2006). That is to say, when a thought comes to mind, it is likely to stimulate an affect. In turn, the affect changes the cognition and both of them change and reshape the output which is the tourism-related behavior in this context. The importance of affects within tourism-QOL context will be delineated in detail in the next section. For now, it is significant to recognize the interconnectedness of cognitions and affects, and the necessity of viewing tourism-related cognitions as a whole.

Positive and Negative Cognitions

From birth on, people face with satisfactory and unsatisfactory experiences which are both represented in mind. Good, pleasing interactions in different domains of life form the basis of positive cognitions, while bad, disappointing experiences facilitate the development of negative cognitions (Wright et al. 2006). Negative and positive cognitions may vary with respect to different domains of activity in life (Kahneman et al. 2003). For example, an individual may have positive cognitions about the social environment while holding negative cognitions about his/her family relations. Moreover, it is possible to have both positive and negative cognitions about the same life domain (Bosque and San Martin 2008). For instance, an individual may have negative thoughts about social relations at work while sustaining positive thoughts about one's social relations in his/her neighborhood.

Positive and negative cognitions exert contrasting influences on perception, evaluation, and information processing, and thus, subjective well-being. Positive thoughts are likely to facilitate viewing an event in a positive light, attending to pleasant aspects of a situation, and anticipating satisfactory experiences to happen (Wright et al. 2006). Positive cognitions, through their interconnections with positive affects, have the potential to ease one's subjective sense of well-being. In contrast, negative cognitions result in pessimistic evaluations and negative anticipations of an occurrence. Information processing biased in favor of unpleasant aspects may deteriorate one's subjective well-being which is directly associated with the QOL concept (Kahneman et al. 2003).

Positive and negative cognitions are also operative in the tourism industry. Positive and negative tourism-related cognitions may involve a particular destination, a particular tourism service (e.g., accommodation, transportation, etc.), a particular service provider (e.g., a hotel or hotel chain, an airline, etc.), or the tourism services as a whole. Examples of positive tourism-related cognitions might be "Traveling is a good opportunity to entertain and relax," "Hotel X provides me with all I need in an excursion," or "Destination A offers satisfactory experiences." Examples of negative tourism-related cognitions may be "Tourism activities are an all too-expensive means of relaxing," "Traveling results in fatigue rather than rest," or "No hotel can provide on-time, satisfactory experiences." Reading through these examples, it is important to keep in mind that cognitions are strongly influential in altering information processing and decision making.

Drawing on the notion that cognitions are dynamic and flexible, it is possible to assert that negative cognitions can be transformed into positive ones in order to improve one's subjective well-being. The improved sense of well-being becomes observable, it changes the behavior. This assertion introduces the next topic of discussion.

Cognitions as the Subjective Determinant of Tourist QOL

In what ways, cognitions can be employed in improving tourist QOL? As explained in prior sections, cognitions are involved in all information processing, meaning-making and evaluation tasks. Cognitions function as the primary frame of reference for interacting with and making

sense of the world, as mentioned. Positive and negative cognitions bias shape attention, perception, and interpretation in favor of pleasant and unpleasant occurrences, respectively. These features of cognitions provide a number of opportunities in the tourism context for advancing tourist QOL.

For one thing, operations of positive and negative cognitions are significant in the tourism context in order to understand its association with QOL. As mentioned above, positive cognitions may facilitate a person's subjective well-being, while negative cognitions deteriorate it (Kahneman et al. 2003). In the tourism industry, providing satisfactory services may facilitate the formation of positive tourism-related cognitions and in turn improve tourist QOL. Thus, there is an indirect link between cognitions and tourist QOL.

Providing good and pleasing services in the tourism industry can enhance positive tourism-related cognitions and contributes to one's overall well-being. Accumulation of satisfactory experiences in the tourism context may have a generalized effect and secure a sense of happiness in life, as Sirgy (2002) has pointed out before. Moreover, people who hold positive cognitions in one domain are likely to see current events and services in a positive light. Thus, with the formation of positive tourism-related cognitions, tourist QOL can be enhanced and sustained.

Positive tourism-related cognitions also imply that tourism as a whole has a pleasant connotation for the individual. The meaning of tourism activities in one's life, if positive, may facilitate his/her subjective well-being. For instance, if an individual views traveling as an "escape from daily hassles" or as an "opportunity for relaxation and rest," then tourism turns into a personally meaningful activity which helps him/her to endure and cope with daily challenges. Thus, enhancement of positive tourism-related cognitions such as "tourism is a good way to relax" or "tourism simultaneously provides rest and novelty" is a fundamental way for tourism industry to facilitate QOL.

Identifying negative cognitions is also necessary in the tourism context since they may turn into obstacles for the advancement of tourist QOL. Tourism services should target negative cognitions and strive to turn them into positive ones. This could be done by presenting services which disconfirm negative expectations and information processing patterns.

Tourist Satisfaction and QOL

Quality-of-life research has examined the relationship of the QOL concept with customer satisfaction. Although the intricate relation between tourists' level of satisfaction and QOL has been suggested in the literature, it has not been a frequent topic of empirical research. Frisch (2006) interchangeably uses the concepts of life satisfaction and quality-of-life. He argues that an individual's evaluation of his/her life and the resultant satisfaction reflect his or her life quality.

There have been attempts to theorize about the tourist and life satisfaction concepts and to examine their relationship with QOL. One conceptual frame on life satisfaction which has found appeal in QOL research has been provided by the so-called bottom-up theory (Neal et al. 2007). The authors explain that in the theory, a person's level of satisfaction in different domains of life like work and family influences his/her overall well-being and satisfaction in life. In the bottom-up theory, a satisfactory experience at work may increase one's overall satisfaction with life or a dissatisfactory experience at home may decrease it.

In Neal, Uysal, and Sirgy's account (2007), the bottom-up theory implicates that an individual's life has many domains of activity and realms of experience which intersect to shape

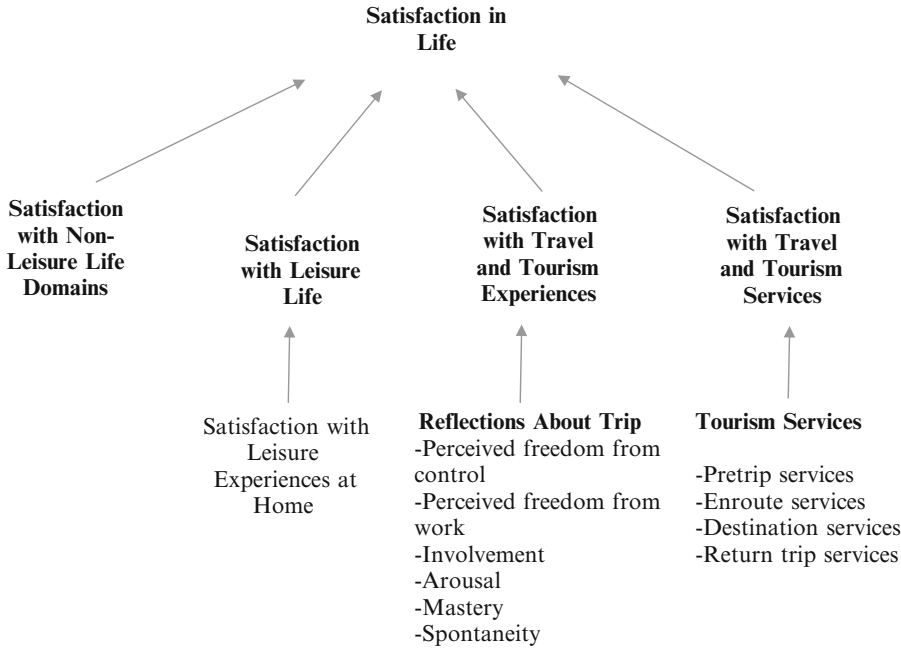


Fig. 9.3 Neal, Uysal, and Sirgy's model of tourist satisfaction (Source: Adapted from Neal et al. (2007), p. 161)

his/her overall satisfaction and quality-of-life. Tourism is one such domain of individual activity which influences affective and cognitive experiences of tourists. The authors suggest that satisfaction with tourism services has the potential to shape one's subjective sense of quality in life.

The link between quality-of-life concept and satisfaction in various domains of life like leisure in the tourism industry has been scrutinized by a number of scholars. One such step has been taken by Neal, Uysal, and Sirgy who have developed a model for understanding the concepts of satisfaction and QOL in the tourism context. In their model, satisfaction with tourism services has been viewed as one of the building stones on which an individual's quality-of-life can be grounded.

Neal et al. (2007) suggest that satisfaction with a tourism product or service can be transformed into satisfaction with the overall tourism experience, then into overall leisure life, and then the last but not the least, into satisfaction with overall life. Within this process, it is important to identify which domains contribute most to satisfaction with leisure life or life in general. The authors also take into account the tourists' "individual and personal lenses" through which tourism products and services are perceived and evaluated. Neal, Uysal, and Sirgy's model has been demonstrated in Fig. 9.3.

Neal et al. (2007), by presenting a model which focuses on both tourism services and tourists' individualized views, challenge the assumption that satisfaction in tourism industry is short-lived and immediate. On the contrary, their model and research demonstrate that satisfaction with tourism services and products may have a long-term influence on satisfaction with overall life. Thus, enhancement of QOL could be achieved by tourism activities which provide pleasant and satisfactory experiences.

Cultural Influences on Cognitions and Tourist QOL

Tourism and culture are highly intertwined processes which have reciprocal exchanges in contemporary world. Cultural tourism has found widespread appeal in recent years. Tourists have become interested in different cultural constructions, artifacts, and ways of seeing the world (Galloway 2008). The intersections with different cultures highlight the fact that there are diverse cultural patterns in making sense of the world and looking at things.

Culture is about how we are and how we interact with the world (Ginsberg 2005). Culture denotes a common language, shared beliefs, values, and behaviors among a community and determines the perspectives taken in life (Hill 2003). Thus, cultural background of an individual strongly shapes who an individual is, how he/she communicates with the world, and in what ways he/she evaluates and processes events and situations in the environment.

Being one of the driving forces in tourism context, culture influences different domains of tourist experience and, hence, quality-of-life (Anderek and Jurowski 2006). Culture exerts an influence on cognitions and their development (Hofstede 2005). Children grow up and socialize in a particular culture in which they are born. Cognitions incorporating the values, beliefs, and norms of one's cultural group are learned and formed throughout life. These culture-bound cognitions shape the way new information is processed, interpreted, and recorded (Ross 2004). The topic of culture-bound cognitions is elaborated on in the next section.

Culture as Software of the Mind: Culture-Bound Cognitions

The term "software of the mind" has been first introduced by Hofstede who has been a prominent figure in the conceptualizations of culture. Hofstede (2005) defines culture as "the software of the mind" which implies that shared values, beliefs, experiences, and common language of the old generation are transmitted to the new one. By this way, an individual's cognitions in the new generation are "programmed" by the cultural conduct of older generations.

Cultural values, beliefs, and appropriate behavior patterns are transformed into cognitions about life and social environment throughout development. These cognitions are thinking patterns which help to lead an adaptive life in a particular cultural arrangement. These culture-bound cognitions alter how one attends to and processes events and perceives the environment (Hofstede 2005).

In Hofstede's (2005) account, culture varies in several dimensions such as individualism–collectivism, power distance, masculinity–femininity, and uncertainty avoidance. Along these dimensions, different cognitions and perspectives develop which incorporate the cultural values. In contemporary world, tourism has been a cross-cultural and international occupation by definition. To delineate the significance of culture-bound cognitions as a determinant of tourism-QOL link, how cultural values varying in these dimensions influence thinking patterns will be exemplified.

Individualism–collectivism is a salient dimension in understanding the role of culture-bound cognitions in tourism-QOL link. Individualism–collectivism dimension is defined by an orientation to self or other (Hofstede 2005). Individualism characterizes a cultural arrangement in which personal matters are prioritized rather than the gains of one's cultural group. Independence, personal freedom, and "I" are defining values for individualistic cultures. Collectivism on the other hand implies that group harmony and interpersonal relations are fundamental to cultural arrangement. People in collectivistic societies attach importance to the concept of "we" to a sense of "togetherness" and put emphasis on the maintenance of harmonious relationships in one's cultural group rather than personal interests (Hofstede 2001).

Cognitions about life, interpersonal relations, and social environment may vary in accordance with individualistic and collectivistic arrangements, which are significant to understand subjective aspects of tourism-QOL link. People in individualistic cultures may have cognitions like “My personal comfort is the most important thing in life,” “My preferences should be addressed to and my needs should be satisfied in service settings,” and “I do not care about environmental and physical factors,” while in collectivist societies thought like “The comfort of my family is very important,” “Needs of my family members and friends should be gratified in service settings,” and “The characteristics of the environment and physical surroundings have significant meanings for me” can develop (Smith et al. 2005).

For instance, a guest from a collectivistic society may feel gratified with a hotel which offers baby-sitting services and provides a space for children to enjoy and relax. Knowing that his/her children can enjoy their times in the hotel’s kids club, the guest may be able to relax and feel released since his/her primary concern would be addressed to. In contrast, guests from individualistic cultures may value the individualized aspects of the tourism services, such as room preference. Thus, tourism services for guests in individualistic and collectivistic cultures function in different ways to increase QOL.

The dimension of uncertainty avoidance is also salient in tourism-QOL link. Uncertainty avoidance is defined as cultural meaning of uncertainty and the capacity to tolerate risk. People in cultures of high uncertainty avoidance prefer regularity, stability, certainty, and loyalty, while low uncertainty avoidance implies tolerance for risk taking, irregularity, and change (Hofstede 2001). Within tourism context, cultural perspectives on risk taking and uncertainty are influential in the development of related cognitions and tourist preferences. For instance, cognitions like “Predictable services satisfy one’s needs better,” and “There should be standardized ways of presenting offers in service settings” can develop in cultures valuing uncertainty avoidance, while in cultures of low uncertainty avoidance, thoughts like “regularity turns into boredom at some point,” and “change in life is joyful” are more prevalent.

With respect to tourism services, people who avoid uncertainty may feel more comfortable with developing loyal bonds to a service provider and consistently prefer standardized services or products. In a hotel setting where regularity is ensured, such a guest may feel more comfortable and relaxed which may positively influence the perceived QOL. Another client who welcomes change and uncertainty may feel bored and unhappy in a similar setting, having a negative impact on his/her QOL over the short term and potentially the long term. Thus, through culture-bound cognitions, the same setting may have both a negative and a positive impact on people of different cultures.

Examples of culture-bound cognitions imply that cultural values, beliefs, and attitudes are highly involved in the perception, evaluation, and processing of life events. Shaping the perception of tourism services, these cognitions are vital points of intersection for tourism and the QOL concept.

Emotional Dimension: Emotions as the Subjective Determinant of Tourist QOL

What Are Emotions?

Affective experiences are vital for giving life meaning and for coloring individual perceptions, evaluations, and cognitions (Wright et al. 2006). For thousands of years, emotions have been a hot topic and numerous definitions of the term have been introduced. Today, complexity of emotional experiences has been recognized and integrative approaches have been suggested.

Emotions can be defined as “behavioral, physiological and psychological reactions and states which come into consciousness in response to particular events and occurrences” (Robinson 2005).

Emotions are the primary means of interacting with and responding to the environment in early years of life. As innate capacities, emotions help the infant to make meaning out of the world long before symbolization skills and cognitions develop (Holodynski and Friedlmeier 2006). Throughout development, emotions with different valences come to be attached to particular cognitions and organized around them. Adult emotions become more refined and regulated experiences with time (Robinson 2005).

In life, emotions have significant functions which facilitate the sustenance of gratifying experiences and survival in social and physical surroundings. According to Fischer and Manstead (2008), emotions function to build interpersonal relations and to help the individual in maintaining group relations. Identifying emotions in self and other are vital to regulate social relations (Wright et al. 2006). Since social interactions are complex and integrative experiences, reading and expressing emotions provides people with a means of dealing with this complexity and adjusting to the environment.

Emotions are also involved in learning new experiences, all of which have a particular affective resonance for the individual. Like cognitions, emotions function to accumulate old and new experiences through imbuing them with personal salience and resonance (Robinson 2005). In this way, emotions come to establish response patterns stimulated under certain conditions. The intricate link between emotions and cognitions grants emotions with more force to determine related behaviors (Robinson 2005).

Affective experiences act as motivators of behavior for the individuals. People may want to enumerate experiences which make them feel better, while they may attempt to alleviate those which stimulate negative feelings (Izard 1991). Therefore, people are driven by their affects, a fact which may have important implications for illuminating the subjective determinants of tourism-QOL link.

Understanding how emotions are organized and how they function in life are vital for the tourism context for several reasons. One is that a good deal of tourism services is offered within interpersonal interactions which are imbued with emotional exchanges. For the tourism services to have a positive impact on the tourist QOL, emotional tone of interactions between service providers and guests needs to be managed. Second reason is that like all domains of activity in life, tourism activities also have emotional meaning for individuals, which directly influence the perceived QOL. The tonality of these emotions warrants more discussion.

Positive and Negative Emotions

Like cognitions, affects can be positive and negative in valence. While affects like joy, happiness, pride, affection, and liking are deemed to be positive; anger, sadness, fear, shame, and guilt feelings are categorized as negative (Sirgy 2002). Initial attempts at theorizing tourist emotions have focused on bipolar conceptualizations. Within these accounts, consumption-related emotions are compiled along the dimensions of pleasantness and arousal level. However, in recent years, a more sophisticated approach has been suggested to understand the role of positive and negative emotions in the consumption process (Lee and Jeong 2009).

Positive and negative emotional reactions are stimulated in particular situations on the basis of previous learning. While people learn that engaging in certain actions in life can facilitate positive emotional experiences, they also learn that there are unsatisfactory circumstances accompanied with negative emotional states (Robinson 2005). Except the cases of character pathology and emotional disturbance, people seek positive experiences in their environment and avoid negative feelings (Haugtvedt et al. 2008).

Negative and positive effects may be triggered as a response to different activities and circumstances in life. Researchers argue that determinants of positive and negative affects do not have to be the same (Sirgy 2002). For example, happiness is a positive emotional state that usually follows achievements or satisfaction in life domains, while the lack of achievements may or may not lead to depression or anxiety. Another example is that an individual may have positive feelings toward his/her work environment, while she/he may hold negative feelings regarding his/her social network.

Positive and negative emotions have contrasting effects on one's sense of subjective well-being. Like cognitions, emotions are involved in interpretation and processing of events, and they directly influence the sense of well-being and QOL (Sirgy 2002). While positive affect may enhance the perceived QOL, negative affect may deteriorate it. Negative and positive affects also operate in the tourism context. People may have positive and negative feelings about the tourism services as a whole or a particular aspect of tourism.

Examples of positive tourism-related emotions can be "joy of traveling," "happiness with sharing a relaxed pastime with family members," and "appeal for an interest in a particular cultural heritage." Negative tourism-related emotions can be exemplified with "anxiety over traveling," "anger for service mistakes," etc. These positive and negative tourism-related affects are subjective determinants which are directly involved in tourist QOL.

At the Intersection of Tourism Services and Emotions: Satisfaction in Life

Consumer satisfaction has been a common topic of investigation in service industries and the hospitality industry. Although consumer satisfaction has been investigated from different perspectives, the current literature shows that satisfaction of tourists and consumers is based on individual perceptions (Bosque and San Martin 2008). In the tourism industry, how the tourists evaluate and perceive a product or service becomes more prominent in consumer satisfaction research instead of objective qualities of the tourism product (Neal and Gursoy 2008).

Satisfaction in life is derived from a comparative evaluation process carried out through subjective lenses of the individual, which could be applied to consumer satisfaction research (Diener and Suh 1997). People have an ideal life condition in their mind. By comparing their current life condition with the ideal one, their satisfaction with life is determined. According to Diener and Suh (1997), if their appropriate and ideal life standards, achievements, or advantageous situations are far away from their current life conditions, they might be dissatisfied with life. If their expectations from life and current life are not very different, they probably are satisfied with life.

As explained above, consumer satisfaction has been construed as a cognitive process, in which a comparative evaluation and conformation–disconfirmation of expectations have been carried out. However, recent research demonstrates that emotions are involved in the formation of satisfaction (Decrop 1999). Therefore, it is possible to conceptualize consumer satisfaction as a cognitive and affective state which results from a particular experience (Bosque and San Martin 2008). According to Haga et al., cognition was linked to "enhanced life satisfaction and positive affects and with lower levels of depressed mood and negative affect."

Emotions as the Subjective Determinant of Tourist QOL

As explained, emotions color individual experiences in all domains of life. It is not possible to talk about a life event without mentioning the affective reactions it stimulated. So, how emotions are involved as a subjective determinant of QOL in tourism context? As the question suggests, it

is crucial to understand the intricate link between emotions and QOL concept. One such attempt is made by Sirgy (2002) who suggests that high quantity and intensity of positive emotions and low quantity and intensity of negative emotions have come to reflect high well-being and QOL.

Consistent with Sirgy's suggestions (2002), emotional experiences of tourists are significant aspects of tourism activities since emotions and their tonality throughout the consumption process potentially exert a strong influence on satisfaction of customers and their perceived QOL. Affects have been shown to strongly shape tourist satisfaction with services since emotional experiences associated with the product or service colors its perception (Lee and Jeong 2009).

The role of emotions in motivating people has been mentioned. Pleasant emotions are appealing to individuals, and individuals are motivated to go to these places which provide them with positive emotional exchanges. As explained, immediate positive reactions to a pleasing event have the potential to become the ground on which one's satisfaction with life and QOL has been established (Neal et al. 2007). In a similar vein, displeasing experiences result in negative emotions, which deteriorate the QOL over the short or the long run.

As a life domain, tourism can be directly mobilized to enhance one's subjective well-being and QOL. Sirgy (2010) points out that tourism can function to directly enhance a tourist's QOL by inducing positive affect in relation to leisure activities. Providing satisfactory services which address guests' individual expectations helps to make them feel happy and satisfied. This temporary effect may be prolonged to transform into an established sense of happiness and QOL. Tourism can also function indirectly in Sirgy's account (2009) by stimulating positive affect in the individual and influencing the life in general. The impact of negative emotions follows a similar path, resulting in immediate dissatisfactory experiences and a continuing sense of unhappiness.

Identifying negative emotions and how do they get triggered in tourism settings is vital for facilitating tourist QOL. Exploration of the reasons behind negative emotions helps to find a way out of the vicious cycle of dissatisfaction. That is, people feel dissatisfied, unhappy, or angry about a service; his or her processing tendencies are biased in accordance, resulting in more dissatisfaction.

Personality Dimension: Personality as the Subjective Determinant of Tourist QOL

Personality refers to organized, integrated, and consistent patterns of thoughts, feelings, and behaviors. Personality, being an integrative term, compiles a number of traits, affective experiences, feeling patterns, and behavioral tendencies (Livesley 2001). Personality shapes how an individual evaluates and interprets life events and how she/he feels about them. The term personality also includes an individual's overall sense of oneself in multiple domains of life like a self-concept in family life, work life, leisure life, and so on. One's self-concept is influential in evaluating self-related experiences and in shaping the meaning of an experience in a particular life domain (Livesley 2001).

The personality of a tourist, being a very complex term, is directly involved with his or her satisfaction in multiple domains of life and, thus, tourist QOL. Personality exerts its influence on life through shaping affective and cognitive lenses by which people look at the world (Livesley 2001). As a comprehensive and integrative structure, personality of the tourists can be regarded as one of the most sophisticated subjective determinants of tourist QOL.

It is very difficult to deal with the personality of each guest in tourism settings, given the multiplicity and uniqueness of tourist experiences. However, commonalities are also found in ways of seeing things among people. For instance, years of social psychological research

demonstrates that people are inclined to see themselves in a positive light. Feeling satisfied with life, in large part, depends on how positive one's sense of self is and how consistent one's experiences are with his/her self view (Haugtvedt et al. 2008).

The fact that people seek self-consistent and self-enhancing experiences have wider implications for the concept of QOL in tourism industry (Sirgy 2002). If a guest holds positive views about herself, she is likely to have a positive outlook and comes to be satisfied with the services provided. On the other hand, a more negative outlook may hinder positive evaluations of the services.

The link between personality, satisfaction, and tourist QOL is complex. There have been attempts to explain personality of tourists in literature. This point is explained in more detail below.

Psychocentric Versus Allocentric Tourists

An initial attempt to conceptualize personality characteristics in tourism research has been made in 1970s by Plog. Plog's framework, called psychographic profile approach, asserts that there are two profiles of passengers called psychocentric and allocentric (Pearce 2005).

In Plog's conceptualization, psychocentric guests are more anxious, timid, and do not like adventure, while allocentric guests are characterized by a likeness with adventure and change. These tourist profiles also differ by their preferences. For instance, allocentric tourists prefer independent travel and have an appeal for undiscovered and unpopular destinations and cultural heritages. On the other hand, tour packages are more interesting for psychocentric tourists (Pearce 2005).

As Plog have pinpointed, tourists may vary in a dimension of anxiety and adventure, regularity and change. What this conceptualization implies for the tourism-QOL link is that a similar service may have different meanings and exert a different influence on QOL for tourists who vary in their personality traits. For instance, a hotel located at the periphery of a city and surrounded by a calm forestland facilitates the QOL of a psychocentric tourist while having a contrasting effect for the QOL of an allocentric one.

Psychopathology and QOL

There has been a good amount of literature on psychopathology and QOL. Research shows that QOL is negatively related with depression and emotional and behavioral distress (Sirgy 2002). The psychopathology may be characterized with low emotional mood, distorted cognitions that enhance psychopathology level, and maladaptive behaviors. Considering the importance of cognitions and emotions on one's sense of quality-of-life, it may be supposed that psychopathology level of an individual is highly influential on the sense of quality-of-life. In addition, economical conditions which are thought to be influential on people's quality-of-life would decrease by an existing psychopathology. People who suffer from various disorders lose their ability to work, or in part, their productivity will decrease the level; chronicity of the psychopathology is another variable that will influence economical and psychological conditions of an individual. The chronicity of these problems is associated with lower levels of QOL (Sirgy 2001). Psychotherapy and treatment with medication aim to decrease individual's well-being by aiming to intervene their emotions and cognitions. In a study, antidepressant treatments have been demonstrated to improve one's QOL (Rapley 2003).

Tourists' pathological conditions may hinder the enhancing function of tourism settings for QOL. Psychopathological conditions are likely to result in negativity bias which refers to a

tendency to attend to negative aspects of a stimulus and to interpret a neutral event negatively (Wright et al. 2006). For instance, a depressive or overly aggressive tourist may attend to imperfections in the service and evaluate it negatively, or a tourist who has anxiety problems may feel more anxious during the tourism-related activity and may evaluate his/her experiences as overwhelming and anxiety provoking. As a consequence, the role of tourism as a facilitator of tourist QOL comes to be limited by tourist's level of well-being. It is possible to give service to everyone in equal quality and equal standards, but it is not possible to affect every individual's sense of quality equally because of the subjective nature of quality-of-life understanding.

Relational Dimension: Tourist–Local People Interaction as the Subjective Aspect of Tourist QOL

Tourism products are offered in an interactive process between two actors, namely hosts and customers. Both actors play a significant role in the construction of the tourism services. Being a reciprocal give-and-take process, tourism services are provided to the customers in interactions with the hotel personnel and local community. Therefore, the relational and interactive process in the tourism service settings needs to be regarded as an integral determinant of tourist QOL.

Tourist and Resident Interactions

The significance of culture-bound cognitions and related affects has been mentioned in previous sections. As explained above, culture-bound cognitions develop in the minds of all individuals, which include tourists and local people. Thus, it is possible to construe tourist–local people interaction as a clash of varying culture-bound cognitions. How this clash is managed have implications for individual QOL.

Tourism services are offered within a relational matrix of tourist–local people exchange. Since the quality of interactions between host and guest is significant, both tourists and residents' perception of tourism activities are influential (Anderek et al. 2007). This idea brings forth the concept of resident QOL and the impact of tourism in shaping it. The interaction between local community and tourist will either increase the tourist's sense of quality-of-life or decrease it, depending on both parties' perceptions of the other party. If the local people view the tourists as unpredictable strangers in their home place, they will treat them badly. They may perceive tourist's behaviors as dangerous and try to protect themselves by avoiding interaction and communication with them. Another inappropriate view that local people take is treating the tourist's as a source of financial gain. The opposite direction of the relationship is important.

Research demonstrates that tourism activities have a great amount of impact on residents' QOL (Galloway 2008). Tourism activities influence QOL of local people by several means such as providing employment opportunities, utilizing local products, and organizing festivals (Anderek et al. 2007). Anderek and his colleagues highlight that the impact of tourism on resident QOL is not unitary. In their account, the facilitating function of tourism services differs by age, gender, social status, and similar characteristics of residents.

Tourism and resident QOL link is important for the present discussion since it may indirectly influence the quality of services offered to tourists (Anderek et al. 2007). When the tourism offers in a destination have benefits for the local people and function to facilitate their QOL, it is more likely to have positive exchanges with tourists who are a part of the tourism industry.

Conclusion

The subjective indicators of tourist's quality-of-life are the issue of current chapter. In order to understand tourist's quality-of-life and its subjective indicators, the concept of quality-of-life is briefly examined at the beginning. The concept has different components such as gross domestic product, life expectancy, happiness, job satisfaction, etc. In order to measure an individual's quality-of-life, objective and subjective measures are used. Objective measures are quantifiable and observable for anyone such as unemployment rate and life expectancy. However, subjective measures are for highly personalized subjective statements about one's quality-of-life such as job satisfaction, sense of safety, and overall satisfaction in life. Subjective indicators of quality-of-life will be investigated in different contexts.

Tourism creates a domain of activity in people's lives, and tourism activities have different meanings and connotations for individuals. These different connotations are caused by subjective differences within individuals as well as their subjective experiences. These meanings are strongly shaped by personal subjective characteristics of tourists which include their cognitions, emotions, personalities, and relational experiences. These individualized meanings which are constructed by the intersection of subjective characteristics in tourism settings influence tourist QOL. Cognitions which are products of previous experiences have great deal to this meaning-making process, and cognitions are triggers of emotions. Positive cognitions about tourism-related activity lead to positive emotions about the tourism experiences. Culture plays an important role that shapes individual experiences and cognitions. Culture as software of mind shapes individual's life with a shared beliefs and values (Hofstede 2005). Cultures are distinguished according to different dimensions. Collectivism-individualism is one of the dimensional distinctions that has made in the literature. People from collectivistic cultures would prefer services that serve accordingly to different group's preferences, whereas people from individualistic culture would concern their selves more than the group, and services that supply individualistic demands would be more appropriate for them. Another dimension is uncertainty avoidance which means that the tolerance for uncertainty is relatively high (Hofstede 2001). People who are from cultures where uncertainty avoidance is high feel more secure and safe when the service provides certain and consistent mission.

In addition, personality is a complex term that includes thoughts, emotions, and behavior patterns of an individual, and it is important to overall life satisfaction about the life in general. In particular, satisfaction related to tourism-related activity is also strongly connected to personality traits. In tourism-related research area, two types of tourist personality are cited as being either allocentric or psychocentric. Psychocentric tourists are anxious and timid, and they generally prefer to group activity, whereas allocentric tourists like excitement and generally prefer to involve in touristic activity alone. Psychopathology of a tourist is considered as another subjective indicator which decreases quality-of-life of an individual.

The tourists' quality-of-life and residents' quality-of-life is highly associated concepts. Local people's quality-of-life would increase because of economical enhancement related to touristic activities and cross-cultural interactions. However, this interaction would decrease residents' quality-of-life in some cases.

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Chapter 10

Medical Travel and the Quality-of-Life

Erik Cohen

Introduction

The term “medical tourism” was coined by travel agents and the media as a catchword ([Wikipedia](#)) to attract Westerners to seek medical treatment in the newly emergent medical hubs in the non-Western world. According to its promoters, “medical tourism” holds out the promise of the best of both worlds: high-quality medical services at affordable prices and a vacation in an attractive setting in some exotic country in the bargain. The alternative of medical treatment abroad was made to appeal to Western patients, whose lives’ savings might be threatened and their quality-of-life (QOL) put in jeopardy by skyrocketing medical expenses or by long waiting lists for treatment for painful or confining complaints, as an unexpected panacea.

The term “medical tourism” has been adopted in medical and tourism studies to designate a subspecialty of health tourism and is defined as “travel outside one’s natural healthcare jurisdiction for the enhancement or restoration of the individual’s health through medical intervention” (Carrera and Bridges [2006](#), p. 447). However, seeking medical treatment abroad does not necessarily involve a specific touristic component; it is, therefore, more appropriate to refer to the generic phenomenon as “medical travel.” Though such travel may be domestic (especially in some big countries like the USA) as well as foreign, this chapter is confined to the latter.

In the course of the 2000s, medical travel has increasingly attracted the attention of students of tourism (Carrera and Bridges [2006](#); Cohen [2008](#); Connell [2006](#); Garcia-Altes [2005](#); Lautier [2008](#)) and has been examined in a number of professional medical publications (Deloitte [2008](#), [2009](#); Ehrbeck et al. [2008](#); Esnard [2005](#); Herrick [2007](#); Horowitz and Rosensweig [2008](#)). Though the impact of travel on QOL has gained some attention in the literature (e.g., Neil et al. [2007](#)), the specific relationship between medical travel and QOL has not yet been explicitly studied.

In this chapter, I shall first present an overview of the development and the contemporary state of medical travel and then discuss the interface between medical travel and QOL.

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The Varieties of Medical Travel

Travel to improve one's health played from ancient times a leading role in the lifestyle of the upper social strata in the Western world. Visits to thermal springs were already popular in antiquity; in premodern times, "taking the waters" in spas used to be an elite leisure activity and became one of the starting points from which modern tourism developed (Lowenthal 1962). Elite spa vacationing has been largely superseded in early modernity by plebeian middle-class sea-side tourism, which was culturally legitimized by a belief in the positive health effects of sun and sea. Health tourism eventually emerged as a huge and diversified multibillion-dollar business. In late modernity, a more broadly conceived "wellness tourism" (Smith and Puczkó 2008) became an increasingly popular form of travel, with "spas," albeit of a different kind than the historic ones, cropping up in great numbers in destinations throughout the world. "Medical tourism," though practiced by the elites of Western and non-Western countries for many years, became only recently recognized as a discrete form of tourism akin to, but distinct in its motivations, practices, and institutional forms from, both health and wellness tourism.

Medical travel in the contemporary world is a complex and highly diversified phenomenon. Horowitz and Rosensweig (2008) have proposed a theoretically significant dichotomic distinction between two principal types (or, in their terms, "models") of medical travel: "traditional medical travel" and "new medical tourism." These types are conceived to differ in many respects, but the theoretically important difference is what these authors call the "directionality of travel": They defined "traditional medical travel" as travel from less to more developed countries for treatment in their major medical centers. This type of travel has existed for a long time but has served a limited number of elite travelers, who could afford the costs of travel and treatment (ibid: 4–5). The USA, Germany, and Switzerland are principal examples of countries whose advanced medical facilities have, for many years, attracted the elites of less developed countries for treatment of serious, often life-threatening illnesses.

In contrast, Horowitz and Rosensweig (2008) defined the "new medical tourism" as travel of patients from highly developed countries to seek treatment in new medical "hubs" in less developed ones. This relatively recent type of travel is said to attract Western patients with limited means who are unable to pay for, or gain access to, the desired treatment in their own country but can afford it in a less developed, non-Western one (ibid: 4–5). Several countries in Southeast and South Asia, Africa, Latin America, and Eastern Europe started in the last decade to attract Western – particularly American, Canadian, and British – middle-class patients to receive medical treatment for a variety of complaints.

The unusual character of the "new medical tourism," and its unexpected recent proliferation, has attracted the attention of researchers in both medicine and the social sciences to the neglect of other developments in contemporary medical travel. The dichotomous classification of the phenomenon by Horowitz and Rosensweig (2008) seems to have masked, under the concept of "traditional medical travel," a third type of such travel, the significance of which has also largely escaped the attention of other researchers: the rapidly growing travel of the upper and middle classes from medically less developed to medically more developed non-Western countries rather than – as was traditionally their tendency – to the West. I will here designate this type, for lack of a better term, "neo-traditional medical travel." While resembling "traditional medical travel" in its directionality, this type differs from the latter in its scale: Rather than a long trip to the developed West, it involves trips from one to another developing country, mostly within the same world region. When Horowitz and Rosensweig (2008) argue that traditional medical travelers from less developed countries are affluent, they refer particularly to those traveling to the USA. I submit that the emergent middle classes of non-Western countries could often not afford a

medical trip to the West but find it affordable to travel to a nearby or neighboring medical hub with better medical services than those found in their own country. Less conspicuous than the unexpected travel of Westerners for treatment to the new medical hubs, the scope of this neo-traditional medical travel is significantly greater than the much discussed “new medical tourism” from the West and apparently constitutes the principal contributing factor to the expansion of medical travel to the new hubs in the non-Western world.

It should be noted that the neglect of the “neo-traditional medical travel” in the literature is not an accidental oversight: It is one consequence of a marked Western-centered bias in tourism studies, which tend to disregard the significant growth in travel between non-Western countries.

We have, therefore, to distinguish between three principal types of medical travel. However, since the important new development in this domain is the emergence of new medical hubs in non-Western countries, I shall focus here on the new and the neo-traditional types of medical travel and will not consider the long-established traditional medical travel to the West.

The Rise of the New Medical Hubs in Non-Western Countries

Following the Second World War, growing numbers of students from non-Western countries went to the West to study medicine; many have stayed on after completing their training, preferring to practice in Western hospitals, and gained considerable experience in various specialties. However, once the opportunities and conditions for practice in their countries of origin had improved, some of them began to return home. The growing domestic middle classes in the more developed non-Western countries, such as India, Singapore, Thailand, Malaysia, Costa Rica, Mexico, and Brazil, have created a demand for advanced medical services, leading to the emergence of a few modern, high-quality private medical establishments in major urban centers, staffed primarily by doctors who have studied or gained experience in Western countries. These establishments were also increasingly patronized by Western expatriates. The most prominent among them eventually became the core of the emergent medical travel industry in non-Western countries. Though domestic patients still constitute the majority of their clients, these establishments have attracted growing numbers of clients from neighboring countries and from the West. As a consequence, the structure of medical travel on the global scale was transformed: Though Western countries, and especially the USA, still host annually a large number of relatively affluent “traditional medical travelers,” the direction of medical travel has been increasingly deflected to these emergent medical hubs in the non-Western world.

The Scope and Structure of Contemporary Medical Travel

After a few non-Western hubs became popular medical destinations, a growing number of countries joined the bandwagon, expecting to attract the new Western “medical tourists.” More than 40 non-Western countries (including some post-communist Eastern European ones) currently advertise themselves as medical travel destinations (Table 10.1).

The apparent proliferation of medical tourism destinations, however, could be misleading. Most of these countries host only a small number of medical travelers or merely aspire to become medical hubs. Some countries, such as Jordan ([Wikipedia](#)) and Tunisia (Lautier 2008), serve primarily the regional market of “neo-traditional medical travelers” but host few Westerners. Other countries, such as Saudi Arabia and United Arab Emirates, seek to attract foreign patients to their recently

Table 10.1 Non-Western medical travel destinations

<i>Asia</i>
Brunei
China
Hong Kong
India
Malaysia
The Philippines
Singapore
South Korea
Taiwan
Thailand
<i>Middle East</i>
Israel
Jordan
Saudi Arabia
Turkey
United Arab Emirates (UAE)
<i>Africa</i>
South Africa
Tunisia
<i>Latin America</i>
Argentina
Bolivia
Brazil
Colombia
Ecuador
Mexico
Panama
Uruguay
<i>The Caribbean</i>
Barbados
Costa Rica
Cuba
Jamaica
<i>Oceania</i>
New Zealand
<i>Eastern Europe</i>
Czech Republic
Hungary
Latvia
Lithuania
Poland
Romania
Russia

Source: Horowitz Rosensweig and Jones [2007](#), [Wikipedia](#)

established modern medical facilities (Saudi Arabia) (several of which are branches of foreign medical establishments based in the USA or Southeast Asia) even as many of their own citizens still seek treatment abroad for their medical problems.

Few countries, in fact, qualify as global medical hubs: The *Deloitte* report ([2008](#)), the most detailed technical study of medical travel on the global level, put their number at about ten

(Thailand, Singapore, Malaysia, India, Saudi Arabia, South Africa, Brazil, Mexico, Costa Rica, and Hungary), to which may be added a few more, such as Argentina, Panama, Israel, and Turkey. But only four countries claim to serve as many as several hundred thousands of medical travelers a year: Thailand, Singapore, Malaysia, and India. Southeast Asia and India, thus, constitute the principal global centers of the medical travel industry. A few other countries report several ten thousands of medical travelers annually, while numbers for many of the other countries listed in Table 10.1 are negligible.

The listed countries also differ in the range of medical services provided: The major centers offer a wide range of specialties, while many of the smaller ones seek to attract Western patients by offering a few types of elective treatments; for example, South American countries specialize in cosmetic procedures and Eastern European ones in dental work.

Medical travel is, thus, a highly concentrated phenomenon, with a wide penumbra of minor destinations. Only a few hubs serve significant numbers of “new medical tourists” from the West, but neo-traditional medical travelers from neighboring countries preponderate even in the major hubs and are virtually the only foreign clients in many minor ones.

The annual scope of medical travel in the world is a moot and controversial matter; while the connotation of “medical travel” is fairly crisp, its denotation is rather fuzzy. Hospitals and governments, eager to prove their standing as medical hubs, tend to exaggerate the numbers of foreign patients – by including expatriates, tourists with medical problems incidental to their visit, or nationals living in the diaspora, who return home for treatment – into their medical tourism statistics. Freely made estimates by various bodies are sometimes ludicrous (Youngman 2009). Global estimates range from an oversanguine claim of five million medical tourists a year (ibid) to the overcautious assertion of the *McKinsey* study that the number of fully fledged medical travelers is at the range of 60–85,000 (Ehrbeck et al. 2008). That study, however, employed a very narrow denotation of the term, referring only to foreign inpatients in internationally certified hospitals in non-Western countries.

This being the case, there is little point in trying to make a “correct” estimate of the global scope of medical travel. However, while sources differ in that respect, they agree on two other important points: the trend toward the expansion of medical travel and the predominance of neo-traditional medical travelers from non-Western countries over the much publicized “new medical tourists” from the West.

The expansion of medical travel has been facilitated, like other “mobilities” (Urry 2000), by the general processes of globalization and the revolution in communications. However, the trend of expansion of medical travel has been significantly modified by historical events and institutional developments in the medical sphere of Western countries. Thus, in the years following the 9/11 terrorist attacks, Middle Easterners found it more difficult to enter the USA and were less welcome there than in the past; they, therefore, increasingly turned to Asian countries for medical treatment, precipitating a trend of considerable expansion of Middle Eastern medical travel to these hubs, which continues to the present.

The disproportionate increase of private medical costs in the USA and other Western countries and the long waiting lists for some treatments in public hospitals in countries with socialized medicine, such as Great Britain and Canada, are also factors which have encouraged the “new medical tourism” to non-Western medical hubs.

However, some recent developments countered the trend toward expansion. The efficiency of socialized medical systems has improved in the last few years, contracting the waiting lists and hence reducing the pressure to seek treatment abroad.

The current efforts of President Obama to reform the US health-care system, if eventually successful, will extend the scope of medical insurance in the USA and might help to reduce the presently spiraling domestic medical costs, thus weakening the enticement of medical treatment abroad. However, even as the new federal legislation might diminish pressures to seek medical

treatment abroad, legislation on the state level may make it easier for insurance companies to send their clients for treatment abroad, thus countervailing the effects of the health-care reform on medical travel.

But the most important factor influencing the future of medical travel seems to be the state of the economy. Before the recent global financial meltdown of 2008, studies like *Deloitte's* (2008) offered exponential projections of the growth of US medical travel in the next decade: 6.00–6.75 million medical tourists in 2009, 9.38 million in 2012, and up to 15.75–23.20 million in 2017 (*ibid.*, p. 4).

The financial meltdown had a most drastic effect on medical travel, as it had on tourism in general: As people put off the quest for nonessential procedures abroad, numbers diminished considerably. *Deloitte* was consequently forced to radically adjust its projections of future growth in US medical travel to 648,000 in 2009 (10% below the actual number of US medical travelers in 2007) and merely 1.62 million in 2012 (*Deloitte* 2009, p. 9).

There is a dearth of statistical information on the composition of inbound medical travel to non-Western countries. However, the existing information from some of the major medical hubs indicates that neo-traditional medical travelers, rather than the “new medical tourists,” constitute the bulk of medical travelers. A study by Arunanondchai and Fink (2007) reported that the majority of medical travelers to the major Southeast Asian hubs in the early 2000s tended to come from Asia, particularly from ASEAN countries:

Malaysia – 60% from Indonesia, 10% from other ASEAN countries

Singapore – 45% from Indonesia, 20% from Malaysia, 3% from other ASEAN countries

Thailand – 42% from the Far East (mostly Japan), 7% from ASEAN countries (*ibid.*, Table 1)

According to a more recent study by Koh and Gan (2009, p. 1), of the reportedly 571,000 health-care tourists to Singapore in 2007, “75% came from Indonesia, Malaysia, China, India and Vietnam. A minority came from as far as Germany, Sweden, Russia and the United States.” The proportion of Asian medical tourists to the medical hubs in the region has recently probably further increased because the global financial meltdown significantly reduced inbound tourism from the West to the region (Viboonchart 2009).

The Transnational Provision of Medical Care

A large number of medical establishments in many countries offer various kinds of treatments to prospective clients around the globe. Patients seeking medical treatment abroad for a particular complaint are hence faced with a huge choice, but ordinarily lack direct acquaintance with the countries, and even less with the establishments, offering the desired treatment. To fill that gap, some mediating institutional arrangements have emerged, which function to link the prospective patients to medical establishments abroad.

For patients, trust is a crucial precondition for choosing a hospital or a specialist. The prospective medical traveler, hence, faces a serious problem: how to gain confidence in the quality of medical services abroad. Unlike at home, trust in transnational medicine cannot be built up by consultation with one's family doctor or social circle; personal visits to an establishment prior to making a decision are also not feasible. Rather, information, consultation, and advice are provided primarily via the Internet.

According to *Treatment Abroad* (2008, p. 2), “The Internet is now the first place that people [in the West] go to seek information about treatment and healthcare issues.” The Internet features comprehensive medical guides intended to assist and reassure prospective medical travelers in their choices. Some medical guides offer free advice on such matters as the benefits and risks of medical tourism or the ways to research a hospital's accreditations or a doctor's credentials, and proffer brief profiles of some leading medical travel destinations.

Intermediaries, resembling travel agents and generally known as “facilitators,” offer on the Internet a wide choice of destinations with supposedly superb medical services, combined with attractive vacationing opportunities. They provide purportedly reliable information on assorted treatments available around the world, their costs, and the credentials of hospitals providing them, thus seeking to encourage people, unfamiliar with far-off countries and suspicious of the quality of their medical establishments, to purchase their services.

To reassure the prospective clients, the facilitators advertise the credentials of their own staff and their extensive network of contacts with highly reputable medical establishments around the world. Some facilitators not only help the prospective patient to choose a hospital abroad but also assess his or her fitness to travel, evaluate the efficiency of alternative procedures for treatment of the patient’s complaint, and forward the patient’s medical documents to the desired hospital abroad; they may even arrange a conference call between the patient and the chosen physician. Such steps are intended to breach the geographical and cultural distance between patient and physician, to prevent mistakes in assignment, and to protect the facilitator from indictments for malpractice.

Facilitators are businesses, working for profit. For their services, they collect a fee of up to 20% of the price of the treatment chosen by their clients (Ehrbeck et al. 2008). They are therefore interested in convincing potential clients to purchase their services. This creates the problem of their credibility. To cross-check the reliability of their advice, patients can directly inspect the accreditations of the hospitals recommended by the facilitators.

There exist many accrediting agencies, differing in their prestige and reliability. The best known and most prestigious accrediting agency for hospitals abroad is the Joint Commission International (JCI), an offshoot of the leading US medical accreditation institute, the nonprofit Joint Commission Organization. Other major international accrediting organizations are the International Organization for Standardization (ISO) and the European Society for Quality in Healthcare (ESQH). However, owing to the significance attached to accreditation, the number of accrediting organizations has increased in the last decade. The rush for accreditation had encouraged the creation of national accrediting agencies in the leading medical travel hubs – India, Thailand, Malaysia, and Singapore – and even in some other countries less prominent in the field. The accreditations provided by some of these bodies, though prominently displayed by the medical establishments that have received them, may be of questionable credibility.

Hence, a new problem emerges in the chain of reliability verification: the credibility of the accreditors. This is an issue to be faced by the recently founded global medical travel organization, the Medical Tourism Association (MTA), based in West Palm Beach, Florida. Intended to incorporate the diverse bodies engaged in the provision of services to medical travelers, the MTA aspires to regulate the medical travel industry on the global level even as it seeks to advance the interests of its members. Its own credibility, however, will depend on its ability to strike an satisfactory balance between these potentially conflicting aims and prevent the latter from overshadowing the former. Moreover, in the absence of legally binding international regulation of the medical travel industry, the efficacy of MTA’s efforts at self-regulation remains dependent on the voluntary compliance of its members. The global medical travel system is thus not yet completely institutionalized.

The Interface of Medical Travel and QOL

“Quality-of-life” (QOL) is a complex concept, which has been defined in many ways according to the authors’ professional and theoretical perspectives. “Health,” however, is a principal component of virtually all definitions of QOL. Without getting entangled in conceptual debates, I shall here adopt a rather narrow definition of QOL as a “personal sense of well-being.” My principal concern in the study of the interface of medical travel and QOL will be with two related issues: (1) the impact of medical travel on the travelers’ sense of well-being and (2) the consequences of

medical travel for the QOL of both the populations of the patients' countries of origin and of their host countries.

The attention of researchers has focused primarily on the "new medical tourism," so we are able to discuss in some detail the specific aspects in which medical travel might benefit the QOL of Westerners, but can only do so to a limited extent with regard to the neo-traditional medical travelers owing to the absence of necessary information.

The principal advantage which medical establishments in non-Western countries have over their Western counterparts is their ability to offer foreigners a wide variety of readily accessible medical treatments, of a quality often equaling that offered by the best Western hospitals, but at considerably lower costs – or as Turner (2007) put it, somewhat simplistically, "First World Health Care at Third World Prices." Specifically, the foreigner-oriented medical establishments in these countries possess four principal features attractive to potential Western clients: the affordability, accessibility, availability, and convenience of treatments, which are not available, involve long waiting periods, or cannot be afforded by the patients in their home country.

Affordability

The principal advantage of medical travel for most Western patients, particularly from countries with privatized medical systems, like the USA, is the affordability of treatments. This is the aspect of medical travel most commonly popularized by its promoters and documented by its students and also the most common motive for medical travel reported in the literature (e.g., Horowitz and Rosensweig 2008, p. 10).

Several studies have compared the costs of various kinds of medical procedures abroad with those in the USA and concluded that treatment abroad promises significant savings. Thus, the *Deloitte* report claims, "When extraordinary travel and insurance costs are added, the relative cost advantage for medical tourism is 28–88%, depending on the location and procedure" (2008, p. 14). However, prices of treatments in some popular medical hubs, such as Thailand, have risen since those data had been collected, though they still remain significantly lower than they are in the West. These price differentials derive primarily from lower doctor's salaries or honorariums, from lower maintenance and medical service personnel costs, and – particularly relevant to our theme – lower malpractice insurance rates in non-Western countries. The latter, however, means that restitution for malpractice is also significantly lower than that in the West, a circumstance which represents a serious risk to the foreign patients' QOL. We shall return to this point below.

The affordability of treatments abroad harbors significant benefits for the QOL of Western patients. It promises the seriously ill to improve their health and prolong or even save their life without falling into the impoverishment trap, as they often would if they had to pay for a similar treatment at home; it enables patients with less serious complaints to save on medical expenses, enabling them to divert resources for the improvement of other aspects of their QOL.

Affordability is probably also a major consideration of neo-traditional medical travelers, though with a slight variation: Treatment in non-Western medical centers is, from their perspective, more affordable than the alternative of seeking treatment in a Western country (rather than in their own country, where it is generally not available).

Accessibility

In Western countries with socialized medical systems, treatments for most complaints might be free, but in some areas of nonessential or "elective" medical procedures, long waiting queues have

emerged. The inaccessibility of treatment – even if, in most cases, not life-threatening – constitutes a serious infringement on people’s QOL. It prolongs suffering, limits mobility, or impairs the ability to work or participate in leisure activities. Foreigner-oriented private hospitals in many new medical hubs possess reserve capacity and are thus able to provide readily most kinds of desired treatments, even though public hospitals, serving the local population of their country, may be overburdened and unable to respond promptly to growing demand. Westerners who prefer not to wait for free treatment at home and are able to afford it might opt to pay for such instantly accessible treatment abroad.

Availability

The unavailability of treatments in their home countries, at least not in the desired quality, is probably the principal, and frequently the only, reason for “neo-traditional medical travel” from medically less developed non-Western countries to seek treatment abroad.

However, several kinds of medical treatments are also not available, or hard to get, in some developed Western countries. There are two main reasons for this: The rate of innovation of new treatments in medicine is such that Western medical systems are often unable to absorb the innovations rapidly due to painstaking approval procedures demanded by strict official regulations. Stem cell therapy is currently the most prominent example of that problem.

Secondly, some types of treatments – though, in principle, legal – are not readily available because of strict ethical and legal restrictions: Gender reassignment (sex change), organ transplantations, and fertility treatments are hard to obtain in Western countries but are readily available in some non-Western ones with less strict ethical imperatives, laxer laws, or less strictly applied (or more easily circumvented) regulations.

While unavailability of these treatments might concern only a minority of prospective medical travelers, their quest for succor abroad creates some of the most serious and complex QOL problems in medical travel; these will be demonstrated by some detailed case studies below.

Convenience

Medical treatment is generally perceived as an unpleasant, though necessary, undertaking; hospitals are stereotypically seen as places of worry and pain, and a hospital stay is perceived as a period during which the QOL of the patient is significantly impaired. The leading establishments in the new medical hubs sought to change this perception by making themselves resemble international hotels and turn the hospital stay into a pleasant experience: The patient is turned into a guest, with all the conveniences, so that his or her QOL during treatment will not be impaired and might even be enhanced. Treatments are, in some instances, followed by a recuperation period, or a vacation, in resorts linked to or recommended by the hospital.

The architecture of leading hospitals in new medical hubs often strikingly resembles that of modern, luxurious hotels, with a wide choice of services and amenities. Hospital Clinica Biblica in San José, Costa Rica, may serve as an example of such a hospital:

The Hospital is self-contained and provides everything that a patient and an accompanying guest may need. Hospital Clinica Biblica has its own pharmacy, cafeteria, eating shops, shopping area, bank, medical laboratories, doctors’ offices and other patient amenities at the same location.

The hallways and waiting areas are very well designed and furnished. There is free wireless internet in the hospital. Also, every floor has an internet café that is free of charge.

The hospital has the latest medical equipment and technology. The patient suites are private and spacious with modern amenities like flat screen TV, phone, security box, wireless internet, and more.

The patient has a choice of beautiful private luxury “recovery centers”... that the hospital offers to Medical Tourists’ post-surgery recovery after discharge from the hospital.

(Hospital Clinical Biblica)

Thailand’s leading foreigner-oriented hospital, Bumrungrad International (BI) offers similar luxurious amenities (Cohen 2008, pp. 241–243), as does the Bangkok International Hospital (BIH). The latter even adapted its services to the needs and preferences of distinct cultural groups, dividing them into three divisions oriented respectively to Arab, Japanese, and international (i.e., Western) patients (ibid, pp. 244–245).

The impressive external appearance and the luxurious amenities of these hospitals stand in sharp contrast to their often poor or run-down surroundings, making them, especially in less developed countries, into apparently isolated islands of luxury, unrelated to the host environment. This led Bochaton and Lefebvre (2009, p. 101), following Foucault (1984[1967]), to perceive these hospitals as “heterotopias,” namely, “a kind of effectively enacted utopia.” While this is an insightful way to interpret the uniqueness of these medical establishments, their apparent isolation is misleading: Though foreigner-oriented, these hospitals also serve the local middle and higher classes, who, in most cases, constitute the majority of their clients; even more significant, these hospitals are very much integrated into the wider capitalist system: Rather than a realized utopia, they are business enterprises whose primary purpose is to make profit from the sale of their services to foreigners and locals alike.

The Choice of Medical Treatments Abroad

No statistical information is available regarding the kinds of treatments medical travelers undergo abroad. Not even incidental information exists regarding the procedures sought by neo-traditional medical travelers, but it seems safe to assume that they are looking primarily for treatments for serious complaints, which are not available in their home countries.

Considerable qualitative information is available regarding the kinds of treatments sought by the “new medical tourists.” Several sources report that they seek primarily a variety of “elective [i.e., non-life-threatening] procedures” (Deloitte 2008, p. 14, Horowitz and Rosensweig 2008, p. 6): various cosmetic treatments, such as breast enlargement, rhinoplasty, liposuction, and hair transplantation; minor surgery, such as kneecap and hip replacement; and dental work. Many of these procedures are not included in health insurance programs in countries with privatized medical systems or involve long waiting lists in countries with socialized systems. These treatments are preferred primarily for their affordability and the relatively low risks involved to the patients’ life – though, if unsuccessful, they might seriously affect their QOL.

The “new medical tourists” are still reluctant to expose themselves to serious medical procedures in unfamiliar places for treatment for life-threatening diseases involving major interventions, such as open-heart surgery or chemotherapy, which are available, and included in health insurance programs, in their home countries.

However, several kinds of innovative procedures, which might be of crucial importance for the patients’ QOL or sheer survival, are unavailable or hard to access in the West but are offered by medical establishments abroad. Such procedures are often controversial, experimental, or illegal in Western countries, and their use in non-Western countries is condemned for ethical or medical reasons. However, desperate patients, nevertheless, opt to submit to them, even though they might be highly expensive and their results uncertain.

Several subfields of medical travel arouse around such procedures. Fertility treatment, attracting “fertility tourism” or “reproductive tourism” (or even “reproductive exile” (Inhorn and Patricio 2009)), is one specialty offered by several countries, among them Israel (Even 2010) and India; in the latter, it in some instances involves the hiring of surrogate mothers (Commercial surrogacy in India). Another is gender reassignment (“sex change”), attracting “sex-change tourism,” which is widely available in Thailand (Cohen 2008, pp. 234–235) and in Brazil.

However, both of these subfields, even though they involve complex treatments and may be perceived as crucial for the patients’ happiness or QOL, are nevertheless elective procedures. There will be no threat to anybody’s life if they were not performed. But some procedures are sought abroad because they hold the promise of survival for desperately ill people (Pianigiani 2009), even though they might be excruciatingly expensive, unproven, or ethically controversial. Such procedures represent extreme examples of the complexities of the relationship between medical travel and the QOL of both patients and local people. To elucidate these complexities, I shall present case studies of three such subfields of medical travel: stem-cell therapy, organ transplantation, and xenotransplantation (transplantation of animal organs to humans). Though they are referred to in the literature, often critically, as different kinds of “tourisms,” these treatments do not normally include a meaningful touristic component but rather involve unpleasant, painful, or terrifying experiences.

Three Subfields of “Medical Tourism”

Stem-cell Therapy

According to Lindvall (2009), “Medical travel for unproven stem-cell-based therapies is commonly referred to as stem cell tourism.” The technique holds a promise for a successful treatment of a great number of serious diseases and disabilities, such as Alzheimer disease, Parkinson disease, stroke, spinal cord injury, various cancers, muscular dystrophy, and even blindness, deafness, and baldness. However, the use of most stem-cell techniques is as yet at a trial stage and has not been approved for the treatment of patients in the USA and most other Western countries, owing to the opinion of medical experts that their effectiveness has not been proved even as they might have serious negative effects on the patients (Lindvall 2009; Lindvall and Hyun 2009).

However, numerous hospitals and clinics specializing in stem-cell therapy have recently emerged at “most distant outposts,” as “desperate patients are traveling far and wide for access to stem-cell cures unavailable in the States” (Pianigiani 2009). Since laws governing medical procedures are less stringent, or less strictly applied at those non-Western countries, their medical establishments are free to offer various mostly unproven stem-cell therapies for a broad range of diseases and disabilities at hefty prices.

The recently created Stem Cell Treatment Advice Centre alleges on its home page that “patients who cannot find treatment for their conditions are looking to Stem Cell therapy as a last resort of improving their life style. However, due to current legislation in many countries there are only a small amount of locations where stem cell treatment is available.” The Centre claims that it researched clinics which provide such treatment in China, Mexico, Thailand, India Georgia, Germany, Montserrat, Pakistan, Panama, Portugal, South Korea, Ukraine, Israel, and Argentina (Welcome to stem cell advice centre); with the addition of Costa Rica and Peru, this list seems to exhaust the places currently offering stem cell therapy to foreign patients.

There exist considerable differences between the medical establishments in those countries in the degree of responsibility and openness regarding the promises and risks of stem cell treatments and in the conditions under which such treatments are administered. In Thailand, for example,

practitioners of “experimental stem cell treatments...must register and comply with [Medical] Council criteria.” Thailand’s leading Bumrungrad International Hospital has announced that it will inform all patients participating in its stem-cell research program of the “experimental nature of the treatment,” will follow official guidelines, and “will not attempt to profit from experimental treatments not yet proven.” The hospital pointed out, “Experimental treatments must be approached very cautiously, especially when they are sought by families as a ‘last chance’ for loved ones in critical condition.” (Stem cell treatment). However, some other medical establishments in Thailand seem to be less cautious. In 2008, it was reported that “some clinics and private hospitals advertise that they provide stem-cell treatment to treat chronic diseases such as diabetes and heart disease. Some provide [unproven] stem-cell treatment for cosmetic purposes” (Sarnsamak 2008, December 23). The President of the Thai Medical Council complained that “private clinics, especially dermatology clinics, providing expensive stem cell treatment, were mushrooming” but cannot be restrained by existing laws (Treerutkuarkul 2009). Due to such misuse, “The international scientific community [of stem-cell experts] has condemned some clinics and private hospitals in Thailand for promoting stem-cell therapy for medical tourism and exploiting patients’ hopes, by purporting to offer effective therapies for seriously ill patients without credible evidence” (Sarnsamak 2008, December 23).

The spreading of the often uncontrolled stem-cell techniques around the world has aroused a growing concern about possible abuses in their use. Lindvall (2009) argues forcefully, “Clinics worldwide over-promise the benefits of their so-called treatments and grossly downplay or ignore the risks...This ‘magic cure’ approach must be condemned under all circumstances. If there is no chance of improvement in the patient’s condition, the ‘therapy’ is both unethical and scientifically and clinically unacceptable.”

Aldhous (2008) complains that there is on the Web “a host of clinics offering supposed stem-cell therapies,” but a survey of 36 of their Web sites showed that “only one...identified the treatment as experimental, while 26 of them presented it as routine.”

A blogger on the Web made the important comment that “though stem cell tourism operates outside the scientific mainstream, stem-cell scientists should care about it not just because patients can be harmed, but because mishaps can cause mistrust of those clinicians who are struggling to meet regulatory requirements and established guidelines to move stem cell research to the clinic” (Baker 2009). The trouble, however, is that in many countries, regulations regarding stem-cell therapy are generally vague or not legally binding. Critics, hence, demand a swift introduction of stricter regulations (Lindvall 2009; Baker 2009). Seeking “to help patients tell the difference between genuine clinical trials, and speculative ‘treatments,’” the International Society for Stem Cell Research (ISSCR) “is drafting guidelines for moving cutting-edge science into the clinic” (Aldhous 2008).

In response to criticism and pressures from the medical community in the West, several non-Western countries have recently initiated steps to regulate the current practices in stem-cell treatment. In 2009, following guidelines prepared by a group of Chinese and European specialists, the Chinese Ministry of Health introduced legal curbs on the practice, forbidding medical institutions from commercializing “stem cell treatments without first proving that they work through proper clinical tests” and getting approval from the Ministry. But the “Chinese authorities now face a huge challenge enforcing the new regulations” (Coghlan 2009). In Thailand, after a long delay owing to “fears the regulation would block the benefits of using stem cell technology for lab research,” the Medical Council “completed a draft regulation on clinical trials using stem cell technology” and submitted it for approval to the health minister (Treerutkuarkul 2009). The new regulation stipulates, among else, that “all stem-cell research...needs to be approved by the council’s ethical committee” (Sirisunthon and Sarnsamak 2010); it has already come under attack for allegedly favoring stem-cell research in private hospitals (*ibid*), namely, those hospitals which serve foreign patients.

Other countries will probably follow suit and attempt to regulate stem-cell research; however, considering the already extensive uncontrolled use of various stem cell techniques, enforcement of regulations will not be an easy task.

Organ Transplantation

According to Merion et al. (2008, p. 993), “The term ‘transplant tourism’ has been used to indicate travel outside one’s country of residence for the purpose of obtaining organ transplantation services.” Though the term has been widely used in the literature (e.g., Khamash and Gaston 2008; Shimazono 2007), Merion et al. (2008, p. 993) argue that “there is a connotation of impropriety at best, and illegality at worst, in the use of that designation.”

In many Western countries, there are long, and growing, lists of people waiting for an organ transplant. In the USA, for example, close to 80,000 people were listed for a transplant organ in 2002, 60% more than in 1997 (Abouna 2003) – a trend signifying that the demand increasingly falls short of supply. In response to a situation in their country in which “the demand for organ transplantation continues to over-shadow the available supply of both deceased and living donor organs” (ibid, p. 988), people who suffer from chronic organ failure travel abroad for organ transplantation. Like in other areas of medical travel, the scope of “transplantation tourism” has not been reliably established, nor are statistical data available on the participants in the process.

Some Asians living in the diaspora in the West tend to travel to their country of origin to receive a transplant, possibly from a friend or relative (Merion et al. 2008, p. 995). But most “transplant tourists” are foreigners from Western and some wealthier Asian and Middle Eastern countries (Budiani-Saberi and Delmonico 2008, p. 927, Shimazono 2007), traveling to poorer non-Western countries in a desperate quest for a transplant; they are willing to pay considerable sums of money for an organ, mostly a kidney, from an unrelated donor, without much concern for the circumstances of its origins.

“Transplant tourism” has become a highly controversial issue since it involves a shady traffic in organs (Scheper-Hughes 2002; Surman et al. 2008a, b). According to Budiani-Saberi and Karim (2009: 49), such “organ trafficking is most significant in countries where there is a destitute underclass, transplantation procedures occur within an established yet inequitable health system, and a governmental leniency exists regarding these practices.” The “donors” are mostly “poorly educated, unemployed, and uninsured individuals living under the poverty line” (ibid. 49) in countries, such as China (Biggins et al. 2009; Budiani-Saberi and Delmonico 2008: 927, Shimazono 2007), India (Jha 2004), Pakistan (Kazim 2008), Egypt, Iran, and the Philippines (Budiani-Saberi and Karim 2009, p. 49).

The sale of organs “raised serious ethical concerns, especially when [transplantations] occur in a country, where the regulatory frameworks to protect live organ donors from coercion, exploitation and physical harm are not well developed or implemented” (Shimazono 2007).

Transplant organs are expensive to the patient. According to Shimazono (2007), “the price of a renal [kidney] transplant package [offered on the Web] ranges from US\$ 70,000–160,000.” The profits from organ sales do not, however, normally accrue to the “donor” but rather to various exploitative “organ brokers” (Budiani-Saberi and Karim 2009, p. 49). The prospect of huge profits instigated the emergence of criminal organizations engaged in human trafficking between countries for the purpose of organ transplantation; these organizations constitute novel problems in crime suppression (Scheper-Hughes 2002; Surman et al. 2008b).

Until recently, most transplantations have been performed in India and in China, but the two countries differed significantly in the sources of the transplanted organs. In India, which became

the hub of organ transplantation already in the 1980s, the organs, primarily kidneys, originated from impoverished Indian “donors.” It has been established that in some cases, “husbands of female [‘donors’] pressured them to sell a kidney” (Budiani-Saberi and Karim 2009, p. 49). However, the practice soon incited international concern: “Reports of large-scale transplants using kidneys bought from economically deprived living donors under questionable circumstances...attracted world wide condemnation.” In the wake of criticism, “the Indian Parliament passed an act in 1995 banning payment for organ donation. Following the enactment of the law, there was a drop in the number of transplants to foreigners in India as transplant tourists shifted from India to Pakistan and the Philippines” (Shimazono 2007). The practice, however, has not been completely extinguished. Rather, an “underground organ market is still existent and [even] resurgent in India” (Shimazono 2007), and transplantations with trafficked organs are still being performed clandestinely in several parts of the country (Jha 2004, p. 541).

Organ transplantations from living “donors” in India proved to be a dangerous business for recipient and donor alike. Jha (2004) reports a high rate of transmission of infections, including HIV, fungi, and hepatitis, as well as short-time mortality among recipients of kidney transplants. Donors have been drawn from a vulnerable segment of the population, and little, if anything, is done for their well-being. Rather than improving it, the sale of an organ had harmful effects on the donors’ QOL; they did not receive the promised money, and they were given poor medical care. Jha claims that “donors are strongly discouraged from returning to the hospitals.” There was reportedly “a high rate of mortality and morbidity among the donors” (ibid). Their family income tended to decline owing to their “limited employability and perceived deterioration of their health” (Shimazono 2007). The donor–recipient arrangement, an apparent solution to the shortage of transplants in the West, which seemed “to be a solution to please all concerned,” is thus, in fact, ridden with serious problems for both sides (Jha 2004).

In China, organs for transplantations, mainly kidneys and livers, originated from executed prisoners rather than living donors (Budiani-Saberi and Delmonico 2008, p. 927, Smith 2001). However, the opportunities offered by China to “high-paying foreigners, who paid hefty sums to avoid a long wait” to obtain an implant, soon became an “ethical hotbed,” threatening China’s reputation. Once it became publicly known that the organs are taken from executed prisoners, China acknowledged “what had long been an open secret on the Internet” and announced “tighter control over its use of the death penalty” (China lures patients in need of kidneys). The State Council (China’s cabinet) strengthened an earlier ban on the sale of organs and issued new rules to standardize transplant surgery procedures (Watts 2007). It is doubtful, however, that the Chinese trade in organs has been stopped (Biggins et al. 2009).

As “transplant tourism” acquired considerable notoriety for both medical and ethical reasons (Abouna 2003), efforts to regulate (Surman et al. 2008a) or eradicate it were made on the international level.

At a conference conveyed by the Transplantation Society and the International Society of Nephrology in 2008, “The Declaration of Istanbul on Organ Trafficking and Transplant Tourism” was adopted. It demanded that “organ trafficking and transplant tourism should be prohibited because they violate the principles of equity, justice and human dignity” and called for “bans on all types of advertising (electronic and print), soliciting and brokering for the purpose of transplant commercialism” as well as the establishment in each country of a “transparent regulatory system than ensures donor and recipient safety and enforces the prohibition of unethical practices” (Delmonico 2008).

However, the efficacy of the Declaration, and of similar efforts to regulate organ transplantation, has yet to be proven. Epstein (2009, p. 134) claims that “recent achievements in the struggle against international organ trafficking may not herald the abolition of transplant commercialism, but rather presage its reconfiguration in deglobalized forms” and called for a more radical strategy in the struggle against international organ trafficking.

Xenotransplantation

Travel for xenotransplantation – the “transplantation of living animal cells, tissues or organs into a human recipient,” known as xenotourism or xenotravel (Cook et al. 2005, p. 5) – is the newest and most risky variety of transplant tourism. It constitutes a potential alternative to a shortage in human organs for transplantations, which is “showing no signs of decreasing in the foreseeable future” (Erlick 2005). However, though it “possesses obvious similarities to transplant tourism, xenotourism raises far more dangers for the international community” (Cook et al. 2005).

Xenotransplantation holds a promise of “an unlimited supply of cells, tissue and organs for humans” (Erlick 2005) and could be used in the future to treat a wide variety of diseases (Ravelingien 2007), but it also harbors serious uncertainties and dangers: “One of these dangers is trans-species viral infection” since “xenotransplantation could mean [that] viruses not previously capable of infecting humans would become infectious.” The risk of “unknown infections crossing the species barrier” is aggravated by the fact that “viruses are not constrained by geopolitical borders, meaning xenotransplantation produces local, national and global angst” (Cook et al. 2005, p. 5).

Ravelingien (2007) points out that “the *major* brake on clinical use of xenotransplantation procedures relates to the possibility that the use of animal grafts may facilitate adverse effects on third parties not involved with the potential clinical benefits” by allowing “transmission of either recognized or novel infectious organs with the xenograft and [thereby] contaminate the xenotransplant recipient, his/her intimate contacts and health care workers, and, at worse, the public at large.” The chances that this might actually happen are unknown and possibly small – but the threat still convinced Western countries to put a moratorium on experimental xenotransplantations.

This leaves, by default, the experimentation with xenotransplantations in the hands of a few countries, notably Russia, China, and Mexico; these countries also offer xenotransplantations to foreigners (De Luca 2006). However, Ravelingien (2007) draws attention to “reports that pig-to-human transplant experiments are currently been conducted in [some] countries without proper oversight.” She warns that such practices “open[s] the door for the risks of ‘xenotourism,’ in which case a patient may seek a ‘xeno’-therapy in those specific nations...The xenotourist may perhaps mistakenly assume that established oversight is in place, or be kept unaware of the potential dangers inherent in the unconventional procedures.”

The important point to note is that the provision of such uncertain procedures to xenotourists in quest of an improvement of their individual QOL may endanger not only the patient’s own health or life but also the QOL of the community by exposing it to unknown, potentially serious health effects. Moreover, the recipient xenotourists might also spread the possible contaminations inherent in these procedures around the globe in a manner similar to the dissemination of HIV-AIDS in the past. Cook et al. (2005, p. 5), therefore, point out that “this globalization of infectious risks highlights a need to consider xenotourism in regulatory frameworks.” However, like in the case of human organ transplantation, such frameworks have not yet been established on a global level.

The three subfields discussed above share some broad characteristics. They all involve unproven or uncontrolled procedures with possibly irreversible consequences. They are, thus, high-stake bets in which patients (or their families) take great health risks for highly uncertain payoffs. The patients are also exposed to risks of fraud and exploitation, inherent in uncontrolled situations in which desperately ill patients are willing to try virtually any experimental procedure to save their lives. But the risks inherent in the three subfields are not equally distributed; they differ in the extent to which they involve risks for the QOL of others: Stem cell tourism endangers only the recipient of the treatment. Commercial organ transplant tourism puts at risk not only the recipients of the organs but also the “donors,” who, by selling their organs, endanger

their own health and the QOL of their families. Finally, xenotourism, while posing unpredictable risks for the patient, potentially endangers the health of the broader community.

The risks involved in these types of medical travel are greater than those inherent in more routine types of treatments abroad. But some risks are present in virtually all kinds of medical travel. This raises the problem of restitution: What can be done in instances in which treatments misfire? Here we reach one of the most problematic aspects of medical travel.

Malpractice

Suing doctors for malpractice became in recent decades increasingly common in Western countries and especially in the USA. Seeking to protect themselves, doctors took out expensive insurance policies against malpractice liabilities; these constituted one of the principal reasons for the skyrocketing prices of medical services and are therefore believed to be an important factor in the expansion of the “new medical tourism.”

The promoters of medical travel seek to create the impression that treatments abroad are highly successful and that malpractice or mishaps are extremely rare. Herrick (2007, p. 17) claims that “little evidence exists that botched operations are a widespread problem in the medical tourism industry.” However, posttreatment complications and straightforward malpractice do occur and constitute the principal risk for the QOL of patients seeking treatment abroad.

Esnard (2005), in a critical early evaluation of medical tourism, already warned of a variety of problems facing its “victims.” However, as Mirrer-Singer (2007, p. 212) points out, “though medical tourism has received an increasing amount of attention in the media, there has been remarkably little commentary about medical tourists who have fallen victim to medical malpractice abroad.”

The quest for compensation in cases of malpractice abroad turns out to be hampered by the absence of any international regulation of medical tourism and is hence surrounded by legal uncertainties (Mirrer-Singer 2007, p. 212). Litigation for malpractice in the host country might pose serious, unanticipated difficulties for the litigant. Non-Western countries have generally less stringent malpractice laws than Western ones, such as the United States (Herrick 2007, p. 18). Litigation in those countries is usually a cumbersome and prolonged process; experience has shown that the litigant has low chances of compensation. Litigation against a foreign provider in the patients’ home country, for example, against an Indian or Thai doctor in a US court, has few chances of success; US courts are “reluctant to assert jurisdiction over physicians who neither reside nor practice in states where the court sits” (Mirrer-Singer 2007, p. 213). However, “medical-tourism plaintiffs may be able to sue [foreign doctors] in their home states if the courts...recognize the ‘continuing tort’ theory of jurisdiction,” under which “a plaintiff’s home state court can exercise jurisdiction over a non-resident physician whenever the physician’s tortious act continues to be felt by the plaintiff upon returning to her home state.” However, unless “the plaintiff has a continuing relationship with the nonresident physician...courts [in the USA] have been reluctant to accept the continuing tort theory” (ibid, p. 214).

Harmed patients might have better chances to be compensated by litigating their facilitator. According to Mirrer-Singer (2007, p. 216), “For medical tourists who want to file malpractice claims in the United States, medical-tourism firms [i.e., facilitators] make attractive defendants.” These firms might be held “liable for including foreign providers, who were negligent, on their network.” Plaintiffs could invoke various juridical theories to support their case; however, Mirrer-Singer (2007, p. 216) points out that “none of these theories fit perfectly in the medical tourism context.”

Plaintiffs could also sue their insurance company if the latter had consented for them to receive treatment abroad. The apprehension that they might be sued for malpractice abroad is, in fact, one of the reasons insurance companies are reluctant to give consent for treatment abroad, even if this alternative may be financially attractive to them. The threat of malpractice litigation is also one of the principal reasons that health insurers were, until recently, reluctant to enter into institutional arrangements with medical establishments abroad for the treatment of their clients.

Similar reasoning explains why doctors in home countries are reluctant to treat medical travelers with posttreatment complications: They run a risk of being sued for malpractice committed by a doctor abroad.

The issue of malpractice constitutes, on the institutional level, the principal limitation to the expansion of medical travel and its integration in Western medical systems; while on the personal level, it constitutes a significant deterrent for people to seek an improvement to their QOL by treatment abroad, as long as the problems involved in medical travel are not directly addressed by the international and domestic legal systems.

The Consequences of Medical Travel on the QOL of the Host Countries' Population

Medical travel has been enthusiastically promoted by a growing number of non-Western countries as a means to boost tourism and spur the upgrade of their own medical facilities. The benefits of medical travel for the QOL of the host countries' populations are, however, a controversial matter. Its advocates claim that medical travel entails several beneficial consequences for the hosts.

It is believed to reverse the medical brain drain by offering attractive opportunities for highly trained emigrant physicians to return home. Some of the most prestigious foreigner-oriented hospitals, like BI and BIH in Thailand and Apollo in India, employ a significant number of specialists who had practiced in the West for extended periods of time, and so do some prestigious hospitals in other Non-Western countries. We do not know, however, how widespread this phenomenon is or to what extent it helps to enhance the QOL or the general population.

Some supporters of medical travel believe that it may have important "knock-on" effects (The Economist 2008) and could indirectly help the poor because the higher standards of private hospitals and state-of-the-art medical technologies and procedures, introduced by hospitals that serve medical travelers, will eventually devolve into the local medical system. But there is no evidence as yet that this is actually happening. The hiatus in the level of medical services between the private foreigner-oriented hospitals and the public ones seems to remain quite pervasive. Like luxurious tourist establishments in midst poor local populations, this hiatus might be a source of social tensions and animosity. Unfortunately, none of the studies that came to my attention investigated the attitudes of the local population toward the proliferation of luxurious foreigner-oriented hospitals in their country.

From a specific QOL perspective, one of the important possible consequences of medical tourism is that the less authoritarian and more responsive conduct of the physicians in foreigner-oriented hospitals, which endows the patients with an agency they do not possess in traditional medical establishments, will eventually filter down into the relationship between local patients and their doctors, that helping to transform antiquated medical practices in the host countries.

Critics, however, argue that medical travel tends to widen the gap between public and private medicine in medical travel hubs: It leads to the upgrading of foreigner-oriented medical institutions

to unprecedented levels of luxury while indirectly causing a decline of public medical services by encouraging qualified doctors in the public sector to leave for attractive positions in private hospitals, thus inciting an “internal brain drain.” Willms (2007), writing about India, complains that “the boom in the medical tourism industry has increased the demand for skilled medical staff. Nowadays, increasing number of qualified medical professionals from the public sector and small towns and hospitals is attracted to the metropolitan health centers...Many of the poor Indians do not seek any treatment at all as the cost for private practitioners is far beyond their financial possibilities,” while private medical enterprises often fail to fulfill the condition “that one-third of the beds would be made available free of cost to poor patients.” Chinai and Goswami (2007) also claim that medical tourism could worsen the internal brain drain in India, but admit that, in fact, “little is known about the impact [the growth of medical travel] is having on [the Indian] health workforce” (ibid).

Increased worries regarding an internal brain drain, and a consequent damage to the public health system, were also expressed in Thailand, in relation to the project to turn the country into a regional medical hub (Hongthong 2008; Sarnsamak 2008, February 5). Medical staff of public hospitals, and experts teaching in medical schools, were found to leave for better pay and work conditions in the private medical sector. However, like in India, in Thailand, data relating to the [internal] “brain ‘drain’ is scant” (Sarnsamak 2008, February 5, p. 1A).

Finally, as we have seen in our case studies, treatments offered to foreigners may have direct impacts on the QOL of locals: In the case of organ transplantation, these are limited to the relatively few local “donors”; in experimental xenotransplantation, however, the potential threat may be much broader, not only to the staff directly involved in administering the treatment but also to the community at large.

The Consequences of Medical Travel on the QOL of the Home Countries’ Population

We know little about the impact of neo-traditional medical travel on the QOL of the population of medically little developed countries. The most important consequence seems to be that foreign hospitals, which receive large numbers of medical travelers from some of these countries, at a certain point start to open branch hospitals there, thus bringing their services to their clients and releasing them from having to travel abroad. Thereby broader strata of the local population gain access to advanced medical services. The extent to which they are indeed financially able to make use of that enhanced access is not known.

In the West, the emergence of the “new medical tourism” has been hailed by some experts as a major innovation, which will help reduce the costs of medical services or shorten the waiting lists for some types of treatments in Western countries. Some researchers even believe that medical tourism had the power to change the US health-care system by increasing competition and efficiency (Herrick 2007, p. 19), thereby exerting pressure on physicians and medical establishments to reduce prices for treatments (The Economist 2008).

While medical travel might indeed have some such impacts on Western medical systems, their magnitude and relative importance seem as yet to be limited. The great majority of Western medical travelers, until recently, went abroad primarily for elective treatments; some seriously ill ones went abroad for various questionable procedures not readily available in their home countries. But only a relatively small number availed themselves of treatments for serious or life-threatening diseases, such as major surgery, for which routine treatment is available at home. Medical travel as yet affects the health aspect of the QOL of the general population of

Western countries only marginally. However, insofar as medical travel will, in the future, be incorporated in their medical and legal systems and in the insurance sector of their economies, it may play a major role, both directly and indirectly, in the improvement of the QOL of the general population.

Conclusions

The absence of detailed and reliable data precludes the drawing of any precise conclusions on the interface of medical travel and QOL. Despite a growing public awareness to the importance of medical travel, even basic statistical information on the number of medical travelers to the various medical hubs in the non-Western world and of the principal kinds of treatments they receive there is not available. Current research has concentrated virtually single-mindedly on the “new medical tourism” from the West and has completely disregarded the numerically largest group in contemporary medical travel – that of neo-traditional medical travelers from non-Western countries to the new medical hubs – just as tourism studies paid, until recently, little attention to the great expansion of tourism between non-Western countries. This leaves us no choice but to confine most of our conclusions to the “new medical tourism.”

The most general conclusion from the available information is somewhat paradoxical: Medical travel has, on the whole, a significant beneficial effect on the QOL of most Western medical travelers, but has as yet no significant alleviating effect on the medical systems of their countries of origin and hence on the QOL of the broader population. The reason for this state of affairs is that the majority of treatments that Westerners chose are medically marginal but significant for their sense of well-being: elective procedures, such as cosmetic treatments, dental work, and surgery for non-life-threatening complaints. Many of these are not covered by medical insurance programs and hence are expensive at home but affordable abroad. Western patients, unlike their neo-traditional counterparts, have not yet taken advantage in great numbers of treatments for serious medical problems, much promoted by the new hubs, such as open-heart surgery or chemotherapy. The reasons seem to be twofold: Many Westerners seem to be still psychologically unprepared to submit to serious surgery in an unfamiliar and remote place despite the accreditations of foreign hospitals and the assurances of their reliability offered by the facilitators. Nor are there institutional and legal arrangements in place which would enable doctors and insurance companies to refer patients to hospitals abroad without exposing themselves to the risk of being sued for malpractice committed by foreign doctors.

The QOL of the medical patient is jeopardized by a variety of risks, varying in severity according to the kind of treatment sought and the quality of medical services proffered. The important point to note is that the many-layered hierarchical, global medical system, intended to enhance the reliability of those services by self-regulation, is as yet incompletely institutionalized; it still lacks a widely accepted and recognized central controlling body, though the MTA aspires to that position. Neither do the legal systems of both the patients’ home countries and those of their destinations provide patients with adequate legal protection against malpractice.

The more the patients’ QOL is endangered by their diseases, the greater the risks they are prepared to take by seeking succor abroad, when no treatment is forthcoming at home. They, thus, become a vulnerable group, exposed to exploitation by unscrupulous foreign curers, often unaware of the risks to their own QOL, or to their hosts’ QOL, of the proffered treatments. These aggravating risks have been clearly exposed in the three case studies presented in the body of this chapter.

While medical travel has as yet had few direct impacts on the QOL of the Western travelers’ home countries, its impact on the host countries’ medical systems, and hence the QOL of the

local population, has become a matter of growing concern. In most general terms, medical travel can be seen as a form of outsourcing – the utilization of cheap labor (in this case, the work of doctors and medical staff, whose remuneration is significantly lower than that in the West) in less developed non-Western countries for the benefit of highly developed Western ones. As such, it could be perceived as a form of exploitation. Medical tourism could thus generate resentment in particular because the services delivered by private medical establishments, while cheap for Westerners, are not affordable to the majority of the local population (though they are used by the elites and growing middle classes). The effect of medical travel is, in many respects, similar to that of luxurious, foreigner-oriented vacationing enclaves in less developed countries: the widening of the gap between medical establishments serving the local population and the foreign guests. Moreover, while at the outset, the establishment of high-quality hospital in non-Western countries has led to a “reverse brain-drain” – the return of qualified medical personnel from abroad – it over time gave impetus to an “internal brain-drain,” from the public to private medical establishments, thus aggravating the quality of medical services for the broad strata of the local population.

However, the creation of high-quality medical establishments in non-Western countries might also have had some beneficial effects for the local medical systems, particularly by introducing advanced medical techniques and new patterns of doctor–patients relationships, which would be gradually disseminated throughout those systems. The extent to which such a process is actually happening is as yet a matter of conjunction.

Medical travel will probably expand in the future, the rate of its expansion subject to economic and political exigencies. Insofar as it will become eventually integrated into the medical and legal systems of the Western countries, medical travel could have an important effect on the QOL of their populations in the future. Whether the effect will be sustainable is an open question: Medical establishments in host countries, aware of the growing demand, might increase prices, as they already did in some popular hubs, making medical travel financially less attractive; a local backlash against the growing reorientation of the medical systems of some countries to foreign clients might have a restraining effect on the further expansion of foreigner-oriented medical establishments in the future.

While research on medical travel is rapidly expanding, few studies as yet focus on specific topics regarding the relationship between medical tourism and QOL. There are several major topics that necessitate close attention. The principal one is the need for a reliable assessment of the consequences of the inflow of foreign patients on the QOL of the population of the host countries. The main issue here is that of the “medical brain-drain” in its three major versions: the reverse brain drain of specialists, who have worked in developed Western countries, to their country of origin; the internal brain drain from public to private medical establishments in the host country; and the recently emerging secondary brain drain, of doctors going abroad, mostly to less developed countries to work in branches of private hospitals of their home country.

Current research has focused almost exclusively on “North-to-South” medical travel, namely, on Western patients traveling for treatment to non-Western, mostly Asian, countries. There is an urgent need for research on the rapidly expanding “South-to-South” medical travel, from one non-Western country to another, especially within the Asian continent. These travelers form the bulk of contemporary “medical tourism,” but we know virtually nothing about their socioeconomic composition, the kinds of procedures they seek, their “touristic” activities, and the significance of their travel for treatment abroad on the medical systems of their countries of origin.

The last major issue is that of the impact of telemedicine on the QOL of severely ill patients. Western countries are already outsourcing a significant part of medical work to less developed countries. But telemedicine holds the promise that patients could become “virtual medical travelers” by being operated on via Internet by a doctor abroad while staying in their home country (Marescaux and Rubino 2005; Senapati and Advincula 2005). This could have a major beneficial

impact upon the QOL of severely ill patients, saving them the inconveniences of travel but enabling them to enjoy the same medical benefits they would gain by actually traveling abroad. The emergence of “virtual medical travel” might have far-reaching implications for the future of medical travel and is hence an important novel topic for study by tourism researchers.

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Chapter 11

Physical, Psychological, and Social Aspects of QOL

Medical Tourism

Ruheet Genç

Introduction

Improved health is one major outcome of the tourists' activities. People choose tourism-related activities in order to spend their leisure time with joy and fun, to relax, to escape from daily hassles and works, etc. (Page 2009):

Holidays need to perform a positive function in the postmodern society linked to reinvigoration of mind, body and soul, enjoyment, entertainment together with a wide range of needs associated with the imagery of holiday-taking. (p. 149)

It is suggested that tourism non-deliberately improves the health and psychological well-being of the individual. World Health Organization (1988 and McNamee and Parry (1990) states that health is “*a complete state of mental, physical and social well-being*” (p. 91 – italics mine). Quality-of-life/well-being and health are reciprocally related terms, as in order to have physical health, one should also have psychological well-being and vice versa.

Within the last decades, tourists *deliberately* prefer touristic activities that would improve their health. High-costs, long waiting list, and legal prohibitions of medical procedures, operations, and surgeries lead many patients to search for alternative health-care services abroad. Patients prefer to undergo medical treatments (e.g., fertility treatment), procedures such as prosthesis operations, surgeries (e.g., arthroplasty, tissue, and organ transplantation), denture care, and denture prosthesis in other countries, such as Israel, Turkey, Hungary, China, India, etc.

In the context of medical tourism, the main motivation of the medical tourist is to enhance physical well-being: This is especially unique as tourism literature emphasizes motivations mostly of different types, such as leisure, escaping from everyday hassles, and works (Torkildsen 1999). Medical tourists and their caregivers may not pay attention to touristic facilities of the medical tourism destination; they may focus on the treatment-related facilities that would enhance the physical well-being and QOL of the patient. The physical outcomes of the medical tourism activities can be easily observable from the health parameters of the patient. From this perspective, QOL of the tourists is the main motivation and the main expected outcome for the medical

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tourism activities. This chapter emphasizes both advantages and disadvantages of medical tourism in shaping QOL of tourists, discussing on the place of medical tourism within the context of tourism and QOL literature.

Conceptualization of Medical Tourism

Definition of Medical Tourism

Health tourism was defined as touristic activities in which tourists' main motivation is utilizing health services by going to leisure settings (Goeldner 1989). Examples of the health tourism are even evident in the history of Ancient Greek: It was suggested that in order to get medical treatment and to be involved in healing process, people traveled to Epidaurus where it was believed that Asclepius – the healing god of Greeks – resides (Bookman and Bookman 2007). For generations, people have always traveled to other countries for spas or sanitariums to improve their health. However, traveling abroad for medical procedures and treatment has not been prevalent until 1980s (Horowitz et al. 2007). In 1980s, medical travel became popular and preferable; people started to travel to medical centers, hospitals of other countries for getting medical care and even treatment. This form of health tourism is called *medical tourism* (see Fig. 11.1). The health tourism does not only consist of medical tourism but also includes illness prevention tourism, to which wellness and specific illness prevention tourism belong.

The distinguishing feature of the medical tourism in the health tourism categories is that the primary aim of the medical tourism is to access medical interventions for ongoing physiological problems. The intervention is time specific; it is given when the person is needed, and hence, medical tourism provides improvement at the illness phase. By contrast, illness prevention tourism serves for the purpose of improvement in general psychological and physiological well-being and aims to intervene with the preillness period.

It should be also noted that medical tourism is viewed as an *outsourcing* activity in which patients utilize medical treatment in health facilities abroad (York 2008). It is supposed that medical tourism is a rapidly developing “*new form of niche tourism*” (Connell 2006; p. 1094).

It can be a good idea to focus on different parts of medical tourism in order to have a better understanding of the concept. In the first place, this type of tourism is mainly influenced by the type of the disease/illnesses. Different countries serve different treatment opportunities depending

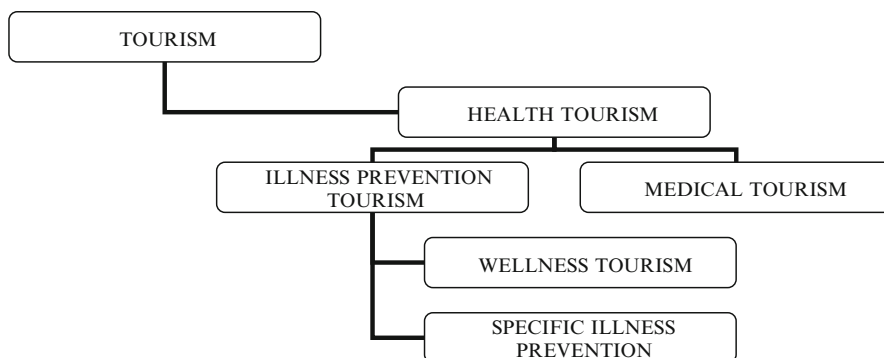


Fig. 11.1 Medical tourism (Source: Adapted from Mueller and Kaufmann (2001), p. 4)

on services specialization areas. Another main important factor is the economic characteristics of the treatment services as well as service's quality. Therefore, guidance of the tourists/patients before and during the medical tourism activity is crucial in order to maintain appropriate intervention (York 2008). When destination is determined, medical center in the tourism destination should be contacted. Physicians in the country of origin should send the medical records or any other information necessary for advance treatments/operations to physicians and patient care teams in the destination site. Appropriate arrangements for travel should be handled; for example, some patients need special arrangement in the airplanes.

Motivations of Medical Tourists

Literature suggests that there are several motivations of tourists to prefer medical tourism:

1. Increased bureaucratic work
2. Issues with health insurance
3. Increased waiting list for medical procedures
4. Low cost and increased quality of medical services in medical tourism destination
5. Information technologies and enhanced communication with medical centers/physicians in other countries.

Increased Bureaucratic Work

Compared to popular destinations of medical tourism, there is much more bureaucratic work for recording and reporting of the medical information of the patient in the country of origin (Turner 2007). Receiving treatment in another country is expected to decrease bureaucratic work of patient.

Issues with Health Insurance

It should be kept in mind that many people are not insured. Insured people might also have to pay high amounts of money for health care at their local settings (Turner 2007). In many countries, costs of plastic surgeries, dental care, and hair transplants are not paid by social security system anymore. Even for insured citizens, health insurance companies usually do not pay for some medical procedures, such as cosmetic dental surgery in countries such as UK or Australia. Social security companies encourage tourists about going abroad for surgeries. Thus, for an individual without health insurance (or even for lots of individuals with health insurance), the cost of the medical procedure would be lower depending on the country that individual goes for treatment.

Increased Waiting List for Medical Procedures

The time from diagnosis to treatment has great importance on the process of decision making for medical travel. Statistics from different countries provide good examples of long waiting times in order to gain access to treatment. Canadians need to wait for 9.4 weeks for medical services after taking appointment from specialist (i.e., physician, surgeon) (Esmail 2006). It takes

25.3 weeks for orthopedic surgery, 20.9 weeks for plastic surgery, 7.1 weeks for gynecologic examination, 2.6 weeks for medical oncology specialist, and 1.0 week for urgent cardiovascular surgery (Esmail 2006). Hence, in England and Canada, patients have to wait for couple of months for surgery (except life saving ones). By traveling to another country for treatment, waiting time for intervention is expected to decrease; correspondingly, improvement in health condition is foreseen. In case of Turkey, absence of statistical knowledge about organ transplantation causes some problems for both researchers and managers (Genç 2009).

Low Cost and Increased Quality of Treatment and Medical Care in Medical Tourism Destinations

Low cost of treatment and medical procedures in medical tourism destinations is a significant source for tourists' motivation for medical tourism (Turner 2007). This issue is held in detail within the context of economic QOL of medical tourists. In past, since low cost of treatment implies low quality of medical services, many patients were not willing to involve in medical tourism activities. As a result of the awareness in the potential of medical tourism for sustainable tourism, hospitals and physicians in the medical tourism destinations have tried to improve their quality of treatment, surgeries, medical practice, and medical care.

As a result, health-care activities in many medical tourism destinations are standardized by gaining accreditation from international health organizations (Turner 2007). Hospitals/health-care centers in the medical tourism destinations try to create a high standard for their medical service quality without increasing the cost of medical care in order to gain competitive advantage with the Western counterparts. For some medical centers or hospitals in the medical tourism destinations, the main difference between their medical care/service and Western medical care/service is the wage provided to physicians. Medical tourism destinations have the advantage of low wage for physicians, nurses, and other health-care service providers over Western hospitals and medical centers.

There are several international organizations for the accreditation of health-care facilities on an international basis (<http://www.health-tourism.com/medical-tourism/industry-certifications/>). International Society for Quality in Health Care (ISQua) and The International Organization for Standardization (ISO) are some examples for international accreditation organizations. There are also regional and country-based organizations that provide international accreditation to health-care facilities abroad. Joint Commission International (JCI) and Community Health Accreditation Program (CHAP) are well-known such organizations in the USA. JCI provides accreditation for health-care centers abroad which are particularly in service of medical tourism. In Europe, European Society for Quality in Healthcare (ESQH) is a similar organization. In Canada, Accreditation Canada, formerly called as Canadian Council on Health Services Accreditation (CCHSA); in UK, Trent Accreditation Scheme (TAS); and in Australia, the Australian Council on Healthcare Standards (ACHS) are other such institutions. The number of hospitals that have JCI accreditation is 32 in Turkey. India and Singapore have 13 hospitals that have the JCI accreditation, whereas this number is five in Malaysia and three in Thailand.

Some organizations also provide certification in order to control the license of the physicians. American Board of Medical Specialists (ABMS) is one these accreditation organizations for physicians in the USA. ABMS involves several specialty boards, such as American Board of Family Medicine, American Board of Neurological Surgery, American Board of Ophthalmology, American Board of Plastic Surgery, and American Board of Surgery. These boards provide certificates to physicians who have proven their expertise in their specialty.

In Europe, there is European Union of Medical Specialists (UEMS) association for the standardization of the several European nations' (e.g., Austria, Denmark, France, Germany, etc.)

Table 11.1 International and regional organizations for the accreditation of health-care facilities and accreditation of physicians/surgeons

Accreditation of health-care facilities	<i>International organizations</i>
	International Society for Quality in Health Care, ISQua
	The International Organization for Standardization, ISO
	<i>Regional organizations</i>
	Joint Commission International, JCI (USA)
	Community Health Accreditation Program, CHAP (USA)
	Accreditation Canada, or Canadian Council on Health Services Accreditation, CCHSA (Canada)
	Trent Accreditation Scheme, TAS (UK)
	The Australian Council on Healthcare Standards, ACHS (Australia)
	European Society for Quality in Healthcare, ESQH (Europe)
	Accreditation of physicians
	American Board of Medical Specialists, ABMS (USA)
	General Medical Council, GMC (UK)
	European Union of Medical Specialists, UEMS (Brussels, Belgium)

medical organizations that provide certificates and license to physicians. In the UK, physicians’ and doctors’ license and certificates are controlled by the General Medical Council (GMC) in collaboration with UEMS (Table 11.1). Many medical tourism destinations send their physicians or other medical specialists to USA or EU to obtain these certifications.

**Information Technologies and Enhanced Communication with Medical Centers/
Physicians in Other Countries**

Via internet, tourists can learn accredited centers in other parts of the world (Turner 2007). They can contact with physicians or surgery teams in these hospitals or centers and can arrange their appointments via internet, even options of prepayment are available.

Quality-of-Life and Medical Tourism

Physical Quality-of-Life and Medical Tourism

As mentioned above, the primary aim of medical tourists is to enhance their physical life qualities through interventions conducted in hospitals of medical tourism destinations. Even though successful surgeries, treatment, or medical care leads to improved health and increased quality-of-life, there are still incidents in which negative outcomes of medical tourism on the physical health of medical tourists occur. One study investigated patients who were examined in a given medical center in the USA and went to other countries for transplantation surgeries between 2002 and 2006 (Canales et al. 2006). Researchers identified ten patients who underwent kidney transplantation in other countries (i.e., Pakistan, China, Iran). Three of the ten patients expressed their intention was having a medical intervention in another country. Researchers identified fatal infections among four patients as a complication of the transplantation. Two acute rejection cases occurred, and one patient died because of transplant rejection. Researchers argued that there was a lack of communication between surgery team in medical tourism destination and postoperative care team, which causes major missing information about the health condition of the patient and, in turn, leads to such adversities.

Similarly, although dental tourism provides cost-effective dental treatment option for patients, problems might emerge as a result of gaps in the follow-up of the dental patients. After dental treatment or surgery, patients need to go abroad for a second or even third session as follow-up. However, patients might have limited time available and the cost of traveling can be quite high, which can serve as factors that make follow-ups unlikely. In addition, it should be noted that further dental health complications (e.g., dental abscesses) can emerge after traveling long distances (Gibbons 2002). Many dental tourists, as a result, are followed up at their home countries (Turner 2008). Local dentists might have to deal with the follow-up of these dental procedures without having proper and adequate knowledge on the prior interventions. Moreover, there might be risky situations for some patients after dental treatment, and without the information of these risks, local dentists could try to intervene with the complications of the dental procedures which sometimes result in worsening of the patients' situation (Asai and Jones 2007). Missing information on the patient's condition leads to delayed intervention to any complications (Canales et al. 2006).

Different countries have different epidemiological profiles (Green 2008). The epidemiological profile of the medical tourism destinations usually differ from that of the local community, making the medical tourists vulnerable to infections. Besides, protocols for infection control ranges between different countries. This results in the variability in quality control of the hospitals and medical centers in medical tourism destinations. Therefore, quality control standards for hospital/food/water hygiene, organ donation, and blood transfusion can be different among hospitals of medical tourism destinations, which can result in a decrease in the treatment outcomes of the medical tourists.

Another main problem is substandard and unreliable outcome results of the medical treatments conducted abroad (York 2008). In many cases, tourists can be satisfied by the health outcomes, and their subjective experience of life quality might improve. Nevertheless, in the big picture, the quality of the health-care activities is not well-known and well-defined phenomena. The possibility of malpractice in medical tourism is a critical issue which should be kept in mind (York 2008). Legal regulations in order to protect medical tourists' health vary across countries and professions, and they are specific to those countries. The underdeveloped legal regulation is a risk factor which can account for malpractices.

In the contexts where malpractice is harshly punished and in medical centers which have accreditation from a well-known international organization, adversities still could come into existence. Individual differences in terms of psychological acknowledgement of the disorder or individual health condition prior to disorder are important factors in treatment phases. The travel itself may have negative effects on the individual in regard to these variables (York 2008). In this sense, the effects of travel become more evident if the distance between two destinations is long: For example, professionals suggested that long-haul air travel can cause embolism. One medical profession deals with issues during travel, namely travel medicine (Page 2009). Travel medicine is related to health education (for example, professionals provide information and advices for healthy sunbathing), accident and emergency medicine, spread of diseases through tourists (epidemiology), tourist safety, and ergonomics. Travel medicine provides tourists medical advice before travel to minimize the health risks of travel. Medical tourists can utilize guidance from travel medicine specialist prior to medical travel (Genç 2011).

It has been suggested that as primary research questions, medical tourists' physical QOL, health status, and morbidity rate should be examined, and the effectiveness of the medical tourism should be investigated in the long run. Further research can also focus on questions like the effects of legislative regulations on medical tourism, the relationship between accreditation and customer satisfaction, posttreatment recalls of the medical tourism experience both from the perspective of the patient and the medical care team on the destination site, effects of travel on the physical well-being in the medical tourism process, etc.

Economic QOL and Medical Tourism

The cost of medical procedures changes depending on the country which provides the services. Medical procedures are costly in the USA, the UK, France, Italy, and Japan. Hence, many people from these countries were seeking cheaper medical procedures, treatment, and health care abroad. Coronary bypass surgery costs \$113,000 in the USA, \$18,500 in Singapore, \$11,000 in Thailand, \$10,000 in India, and \$9,000 in Malaysia. The cost of a spinal fusion surgery is \$90,000 in the USA, \$9,000 in Singapore, \$7,000 Thailand, and only \$5,500 in India. Hip replacement costs \$47,000 in the USA, \$12,000 in Thailand or Singapore, \$10,000 Malaysia, and \$8,500 in India (see Table 11.2) (Medical Tourism International 2007). Breast implant surgery costs €4,350 in UK, €1,920 in Poland, €1,930 in Hungary, €2,087 in India, and €1,800 in Turkey. Face lifting surgery costs €4,810 in the UK, €2,165 in Belgium, and €2,196 in Czech Republic.

These prices demonstrate the cost-effectiveness of medical tourism. The quality of economic life would increase due to this type of cost-effective medical procedures in different countries. In addition, a new way of marketing is applied in different countries: package programs. In Turkey, as one of the applicers of the package program strategy, one accredited hospital offers outbound tourists lasik eye surgery (eye surgery with laser technology) package. Lasik eye surgery package includes standard and full packages. Standard lasik eye surgery package of the hospital includes services such as pre-surgery examinations and tests, lasik surgery to two eyes, first treatment after the surgery, first check-up in Istanbul, and counseling services for the tourist. This standard package costs medical tourists €450. Full eye surgery package involves all services provided in the standard package plus transportation services (tourists are taken from airport and transferred to hotel and the hospital) and three-night stay in five star hotels (one person). After patient's eye returns back to a state of normal functioning, hospital provides a city seeing for a half day and English counseling services. This package costs tourists €1,090. For coronary bypass surgery, a standard package costs €7,350. It involves pre-op and examinations, coronary bypass surgery, one-night stay in intensive care unit, two-night stay in the hospital room, medical care after surgery, and the first check-up. Full package of coronary bypass surgery costs €8,550; in addition to all services in standard package, it involves transportation between airport and hotel and hospital, six-night stay in a five-star hotel, 1 day sightseeing, and English guidance services. The medical tourism, hence, has economic advantage by combining both treatment and joy oriented sides of the tourism.

It has been noted that the amount of money and time that a patient would save is an important factor to consider and prefer medical tourism. It should be kept in mind that the link is not that direct all the time. The time passing while a patient is waiting for the treatment has indirect economic effects as well: Research demonstrated that long time for medical services put off patients to be functional at work, decreasing their level of income and, in turn, the productivity of their countries (Esmail and Walker 2005). For instance, in Canada, waiting for medical services or treatment costs \$673,555; waiting for orthopedic surgery costs \$198,442; plastic surgery costs \$38,992; gynecologic examinations costs \$14,826 and medical radiation costs for \$318.

There are cases in which the patient has to wait for the medical care, and this situation sometimes keeps primary care givers of the patients off the work for some period (Esmail 2006). Primary care givers usually look after the patients; they take care of their nutrition, health condition, transportation to the hospital, etc. As long as the patient waits for the medical treatment, primary care givers of the patients have to take care of their patients. There are even instances in which they are forced to quit their jobs and not respond to occupational opportunities. They might continue working, yet the emotional burden of the illness of the loved one might reduce their productivity.

Table 11.2 Comparative costs of some medical procedures in USA, Thailand, Singapore, Malaysia, and India

	Cardiac and vascular surgery		Neurosurgery		Orthopedic surgery		Oncologic surgery	
	Coronary Bypass surgery ^{a,b}	Heart valve replacement ^{a,b}	Angioplasty ^{a,b}	Spinal fusion surgery ^c	Hip replacement ^{a,b}	Hip resurfacing ^{a,b}	Knee replacement ^c	Mastectomy ^c
USA	\$113,000	\$150,000	\$47,000	\$90,000	\$47,000	\$47,000	\$58,000	\$43,000
Thailand	\$11,000	\$10,000	\$13,000	\$7,000	\$12,000	\$10,000	\$11,000	\$9,000
Singapore	\$18,500	\$12,500	\$13,000	\$9,000	\$12,000	\$12,000	\$13,000	\$9,000
Malaysia	\$9,000	\$9,000	\$11,000	—	\$10,000	—	—	—
India	\$10,000	\$9,000	\$9,000	\$5,500	\$8,500	\$8,250	\$8,500	\$7,500

Source: ^aMedical Tourism International (2007), ^bCarabello (2008), ^cUnti (2008)

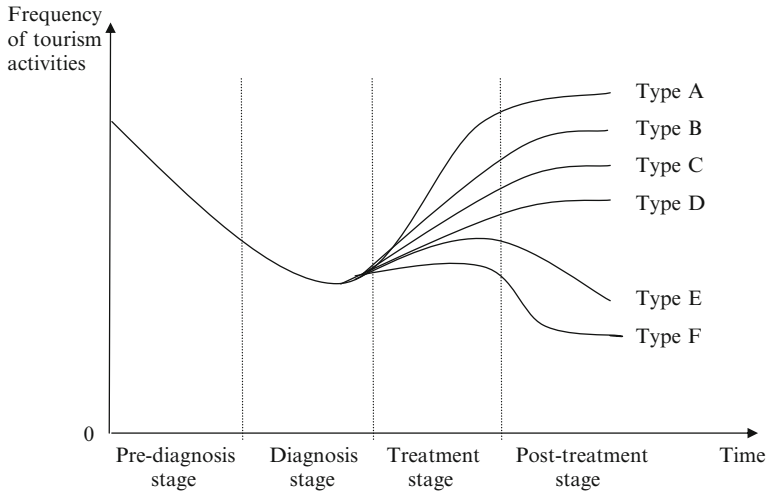


Fig. 11.2 Types of medical tourists (Source: Adapted from Hunter-Jones (2005), Fig. 1, p. 79)

Future research on the financial well-being of the individual stands out as another fertile area. Studying the relationship between patient satisfaction and financial costs, the experiences of patients who went abroad to receive treatment and the financial comparison of different countries in terms of treatment are among the subjects that researchers can work through.

Psychological QOL and Medical Tourism

Aside from contributing to economic and physical well-being, it is suggested that medical travel enhances the psychological QOL of the tourists. The biological interventions such as operations and medical treatments have psychological impacts on the individuals who receive this kind of medical interventions (James and Hollandworth 1988). One study reported that cancer patients need touristic activities to “bridge the gap between illness and everyday life, providing a mechanism for enabling a patient to return to a sense of normality even if only for a defined period of time” (Hunter-Jones 2005; p. 77). In a way, patients escape from their everyday life, in which cancer encompasses the very major course. Research showed that cancer patients prefer medical travel with this motivation particularly in prediagnosis and diagnosis stages of the cancer (Fig. 11.2).

Waiting for surgery list, high cost of treatment/surgeries, dysfunctionality due to symptoms related to illness lead to the demoralization of the patients and their caregivers (Turner 2007). They have to deal with severe symptoms of illness while worrying about the time the patient is going to have the surgery/treatment, the outcomes of the treatment, paying the cost of treatment, etc. In severe/life threatening illnesses, such as cancer, the illness itself is the main source of demoralization or depression for both patient and his/her family members. They need to be supported financially and psychologically in the diagnosis and treatment stages of the illnesses.

In medical tourism when the biological adjustments are directly aimed, the psychological well-being of the tourists is also indirectly aimed to change. Medical problems generally lead to stress and anxiety for the person because of both physiological and treatment-related problems (Luebbert et al. 2001). The uncertainty about the length of the time between diagnosis and

treatment, the length of the healing process, and the posttreatment process could increase stress and anxiety of the person. In the first place, the clarification of the information about the illness/disease and the information about the process gives some relief to the patient. Then, knowledge about the procedures gives the person a sense of control which is important for an individual's psychological well-being. The postintervention period is also important for the person to reduce his/her anxiety and to feel better about him/herself. The psychological improvement would also be visible if the process provides enough comfort and the sense of control for the person.

Although medical tourism seems to be effective in reducing psychological distress related to illness and good for medical tourist's well-being, there are still some personal factors which can influence the medical tourist quality-of-life negatively. Receiving medical treatment in a foreign country would be anxiety provoking for some patients because of the idea that being away from home is dangerous. Some people may think that they cannot get enough care and attention in a country other than their own. Psychological adversities influence the healing process in a negative manner; this type of distress and possible anxiety-provoking conditions should be minimized.

In addition, any severe complications, which emerge following the treatment in the medical destination or during the trip back to home country, can cause higher demoralization of the patient and family members. This is mostly because these people are usually warned about the possible complications (such as, emboli, infections) related to long-haul trip or medical center in the medical tourism destination. They usually decide on going abroad for treatment by themselves sharing the responsibility of possible complications. In most cases, family members tend to blame themselves for allowing the patient to go to another country for treatment instead of waiting in the local medical center.

Moreover, although medical tourism activities generally have beneficial effect over psychological problems of the patients, patients might not be motivated to be in medical tourism activities because of demoralization after the diagnosis stage of the illness. They may think that any treatment would not help them in dealing with the illness and hence reject to have treatment at all. Or they might not be confident about their physical abilities to travel, stay in other countries for treatment, or make benefit from the treatment/medical care offered in the medical travel destination. They may fear of having long-haul trips by thinking that they cannot cope with physical difficulties related to traveling (Hunter-Jones 2005). In this sense, it should be noted that patient demoralization can influence the tendency to consume medical tourism services.

Sometimes, attitudes toward people in the medical tourism destination might lead potential medical tourists not to select treatment abroad (Hunter-Jones 2005). Medical tourists' prejudice on races, religion, or skin color (or the prejudice of the host community toward the potential medical tourists) might reduce the motivation of medical tourists for traveling. Stigma attached to the disease of the patient can also play role in social isolation of the patient in general and diminish motivation for medical tourism in particular (Thomas 1998). Medical travel planners should be aware of demoralization-related and attitude-related hesitations about medical travel and encourage these patients by motivating them and their family members. All of these examples provide evidence that psychological variables both influence the medical tourism experience and are influenced as an outcome.

Another aspect of the relationship between psychological QOL and medical tourism is that people are likely to engage in tourism activities to have a more positive psychological state and mood. Various medical tourism centers offer psychological intervention programs such as rehabilitation programs and yoga-meditation programs. Israel, India, and Thailand are the forth coming countries in that area of tourism. Israel provides drug dependency rehabilitation program which aims to deal with dependency issues which last approximately 8 months. In India, sleep disturbances and loss of consciousness is aimed to cure with the help of successful application of neuroscience techniques.

The psychological relaxation and elimination of distress can be provided by yoga and meditation. It is considered a powerful tool for relaxation and reduction of psychological distress (Woolery et al. 2004). The principles of the yoga have been in service of the humanity for thousands of years. It holds the assumption of the integrity of mind and body and that the relaxation of mind and body go hand in hand. Many people prefer to participate in this activity in their domestic country, whereas some people choose to visit other destinations, especially sites related to philosophical aspects of yoga, for this activity. Yoga and meditation are generally considered under the umbrella of wellness tourism (Smith and Kelly 2006). However, it can be applicable in rehabilitation purposes after physical illnesses or psychological disturbances. Both yoga and meditation can be considered as in the grey area between wellness and medical tourism; they may be preferred either for personal growth or as a component for a treatment.

Another popular alternative intervention is acupuncture which China is famous for. According to World Health Organization, acupuncture is effective for the treatment of 28 different psychological and physiological diseases (Zhang 2003), depression and headaches being just a few examples. China gets the attraction from medical tourists for many years for this traditional healing technique which are considered to contribute a lot to psychological well-being and the quality-of-life of the tourist. The increasing interest in the relationship between the body and the mind suggests that the tourism manager of the new era cannot be indifferent to these aspects of tourism.

Legal, Ethical, and Social Conditions: QOL of Local People and Medical Tourism

Medical tourism can be beneficial to local people at the tourism destination (Turner 2007). First of all, it vitalizes the tourism activities and tourist input. However, local people at the tourism destination can face with economic inequality and problems with local health services creating health inequality (Turner 2007).

Transplant tourism is a striking example in this regard: One of the major drawbacks of the transplant tourism is organ trafficking. In organ trafficking, wealthy patients buy organs (i.e., kidney graft, liver graft, etc.) from poor people residing in another country. Organs procured from poor living donor are transplanted to patients; and the donor is paid for his donation (Budiani-Saberi and Delmonico 2008). In most severe cases, organ is procured via threat, force, fraud, or deception of the living donor person. It is stated that organ trafficking is:

the recruitment, transport, transfer, harboring or receipt of living or deceased persons or their organs by means of the threat or use of force or other forms of coercion, of abduction, of fraud, of deception, of the abuse of power or of a position of vulnerability, or of the giving to, or the receiving by, a third party of payments or benefits to achieve the transfer of control over the potential donor, for the purpose of exploitation by the removal of organs for transplantation (The Declaration of Istanbul on Organ Trafficking and Transplant Tourism 2008; p. 1228).

There are some illegal organizations that enhance organ purchase within specific destinations in the world (Budiani-Saberi and Delmonico 2008). According to reports of WHO (2007), for at least 5% of the organ transplants, organ procurement is obtained through organ trafficking. For that reason, medical tourism is seen as the major source of organ trafficking and organ commercialization in the world.

Some countries has made legal regulations against organ trafficking. For example, in Iran, it is forbidden for its citizens to donate organs to foreigners or received organ donation from them (Ghods and Nasrollahzadeh 2005). Organ trafficking issue was held in "International Summit on Transplant Tourism and Organ Trafficking" which was conducted in 2008 in Istanbul, Turkey.

Final reports of the summit were reviewed in “*The Declaration of Istanbul on Organ Trafficking and Transplant Tourism*” (2008). The Declaration of Istanbul states that illegal organ selling/commercial decreases the well-being of the people in the host community. It argues that transplant tourism is appropriate only if the organ sources provided to medical tourists are sufficient for the patients in the local community. Otherwise, transplant tourism becomes organ trafficking by exploiting the impoverished resources of the local patients.

Possible Solutions to Problems Encountered in Medical Tourism

As stated throughout the chapter, various types of difficulties might emerge throughout the medical tourism process. As an example of social difficulties, patients might face with communication difficulties, which reduce their participation in medical tourism activities (Hunter-Jones 2005). The main challenge for medical tourist is to understand the language of people in the medical tourism destination. From airport to accommodation place and to the hospital, patients have to communicate with people of the foreign country, who may not be English speakers. In the worst scenario, physicians of the medical tourism destination misunderstand the patient/or medical record of the patient due to problems in understanding the language of the medical tourist, which might even result in inappropriate treatment/surgery or fatal mistakes. Travel agents and medical tourism planners should support both medical tourists and physicians for appropriate communication of the medical record and presenting symptoms of the patient.

Obtaining travel insurance from insurance companies is an obstacle for medical travel (Hunter-Jones 2005). The health insurance of medical tourists may not cover additional health expenses in the medical tourism destination which results in a decrease in the economic quality-of-life of the patients. One solution is to choose economic medical tourism packages of the hospitals/medical centers of the medical tourism destinations.

American Medical Association (2008) revealed of guideline of medical tourism for patients, physicians, insurers, and other related groups in order to ensure the safety of patients. This guideline states that:

- Patients should take into account international accreditation of the medical centers abroad. They need to choose those centers and institutions that have international accreditations by globally known organizations, such as the Joint Commission International, the International Society for Quality in Health Care.
- Health-care managers should provide information to patients on their legal rights in the countries they go for the medical procedures and care.
- Patients are also to be informed about possible risks of medical tourism in general. They particularly should have information about the adversities of the traveling long hours within the context of their current health condition and following the medical procedures.
- Health-care managers should organize and budget the follow-up medical care before the patient goes to the medical travel in order to handle the coordination of the health care of the patient.
- Beside to the coordination of the health-care management team, health insurance should cover follow-up health-care costs of the patients within the medical travel package.
- Health-care managers should get information about medical tourism destination’s health-care centers’ and institutions’ accreditation, physicians’ licensing before patients’ travel. Following the medical procedures abroad, these centers and institutions should inform the local health-care management team about the outcome of the procedures conducted abroad. The records of the medical procedures and medical care should be in standardized form. For example,

records of the patients are required to be kept in accord with the Health Insurance Portability and Accountability Act (HIPAA) guidelines.

- For ethical concerns, AMA (2008) recommends that patients should voluntarily select the medical tourism option. This option also should not deter patients to utilize other alternative medical procedures
- One of the biggest issues in organ transplantation logistics is the legal regulations (Genç 2009).

Health ministries in most of the health tourism destinations necessitate new regulations in public health regulations. The declaration of the second congress of International Health Tourism (2009) suggests the institutionalization of health tourism activities under the division of health ministry. All organizations that are dealing with health tourism activities need to be under the control of governmental health institution. Their medical activities should be standardized in accordance with international accreditation for safety of patients. It conceptualizes health tourism as a positive force for enhancing overall life quality of the world and overall tourism activities.

In order to enhance the quality-of-life of the tourists, tourists should be informed to keep all their health documents (such as medications applied to patient prior or after the dental surgeries) or surgery reports conducted abroad (Leggat and Kedjarune 2009). Information sheets could be utilized in any surgical/medical emergencies (American Dental Association 2006). Emergency kits can be procured for tourists that are traveling after surgeries abroad (Kedjarune and Leggat 1997).

For dealing with organ trafficking, The Declaration of Istanbul on Organ Trafficking and Transplant Tourism (2008) recommends standard protocols for oversea organ donation and transplant tourism across each country. All organ donation and organ transplantation conducted overseas should be recorded. Health professionals, public, and the patients should be educated on the pros and cons of transplant tourism and facts of organ trafficking. Informed consent from donors and medical tourists should be taken.

Conclusion

Medical tourism is known as traveling across different destinations along the world in order to obtain health-related interventions being mainly either treatment or rehabilitation directed, and it has been attractive for many people across the world. As providing “health” is the main target of the medical tourism, the quality-of-life is highly connected to an individual’s health conditions. Medical tourism has dual effect on individual’s adjustment, firstly by direct intervention to physiological state of the individuals and secondly by indirect influence to their psychological well-being.

Considering financial properties of the medical tourism makes the picture clearer; the whole picture shows itself behind the quality-of-life criteria. The medical intervention’s price is generally lower in many medical tourism-oriented countries such as China, India, Israel, and Turkey than the many European countries and USA. Traveling along destinations in order to reach health-care services sometimes becomes more cost-effective than receiving treatment in the domestic country. New marketing strategies are emerged to regulate and standardize financial part of this type of tourism.

The time passing through diagnosis to treatment is an important factor that contributes positively or negatively to the healing processes. In many countries, people generally wait a list of other people until the adequate medical procedure and intervention is appropriate. If the time has probable adverse effects on the individual’s current health conditions, searching for other options became a dominant strategy which is used by patients or patients’ care givers. The medical

tourism is an attractive opportunity both for patients and patients' caregivers in this situation as it is cheaper than the services in the country of origin, and it also provides other activities than the health care itself.

The increasing demand for medical tourism and the human flow toward the new medical location brings the risk of malpractice. In order to decrease risk factors associated with malpractice, standardization of procedures are needed to be applied widespread in the medical tourism host countries. The accreditation of local health-care services is a significant protector of both tourists' health and local health workers' work conditions. The legal and ethical issues related to medical tourism would be better acknowledged if the standardizations of procedures and accreditations of health-care services were managed.

In the long run, standardization and commercialization of the medical tourism will increase the number of medical tourists (Connell 2005). Developed countries such as USA face with increasing problems with the social security and health systems (Turner 2007). It is argued that as long as these problems prevail, medical tourism is expected to increase in following decades. Successful outcomes of surgeries conducted overseas and increased support of insurance companies for medical tourists will increase the medical tourism trend in the world.

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Chapter 12

Place Affinities, Lifestyle Mobilities, and Quality-of-Life

Daniel R. Williams and Norman McIntyre

Introduction: Place, Mobility, and Globalization

Tourism is a spatial practice involving two seemingly opposing geographic processes. One is aptly captured by McHugh's (2006b) phrase "nomads of desire" referring to the ways amenity-seeking mobilities and travel are deeply rooted in the Western imagination. The other is succinctly expressed in Lippard's (1997) book titled *The Lure of the Local* describing the enigmatic and increasingly multicentric nature of place affinities and attachments and sense of home and community. Within the social sciences, place and mobility have long been treated as distinct topics with their own distinct literatures (Cresswell 2006; Gieryn 2000). In this context tourism represents an important global phenomenon increasingly understood as the interactive convergence of these two spatial practices (Hall and Müller 2004; McIntyre et al. 2006b).

Ironically, both place affinities and mobilities have long been discussed as distinct and opposing factors influencing quality-of-life (for reviews, see Gustafson 2001, 2006). The typical assumption has been that mobile individuals are less likely to develop or maintain strong attachments to places and, conversely, that people with strong attachments are less eager to relocate (Fried 2000; Stokols and Shumaker 1982). As this research evolved, it became clear that the relationship between the two phenomena is quite complex, depending on the scale (local to global) and temporal dynamics (frequency, distance, duration) involved (Gustafson 2009).

In many ways, the original impetus for place attachment research was tied directly to human well-being. The earliest studies focused on how people responded to relocation, displacement, or loss of residential places, neighborhoods, and homes (Fried 1963; Manzo 2008; Stokols and Shumaker 1982). Despite the often negative connotation given to excessive mobility in the residential realm (even diagnosed as "root shock" by psychiatrists) (see Fullilove 1996), touristic mobility is often valorized as a positive feature of modern life (Leed 1991; Rojek 1993). More recent studies

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and theorizing on the relationship between territorial bonds and mobility have posited that place bonds take on greater significance in proportion to one's mobility and even that mobility may produce a sense of attachment (Gustafson 2009; McIntyre 2006; Williams and McIntyre 2001). In sum, permanent or chronic residential mobility has traditionally been characterized as disruptive and negative, whereas temporary and cyclical forms of mobility are typically characterized as positive and fulfilling.

In this chapter, we develop the idea that these twin processes of place affinities and lifestyle mobilities are inseparable and essential to understanding quality-of-life, which in this chapter is viewed as an ongoing psychological process of developing a coherent self-identity narrative (Williams and McIntyre 2001). Our globalized age has made the movement or circulation of people, ideas, and goods a ubiquitous aspect of the human condition. Tourism lies at the very core of modern quality-of-life because it is an increasingly prosaic realm within which people seek out and negotiate meaning and build identity into their lives. The modern globalized age empowers many people to actively circulate among a great many places as part of living the good life. We mean that this is not simply for those actively engaged in travel to visit destinations but also for those who reside in or make a living on the character of such destinations and other peoples' desires to visit them and those whose local quality-of-life is impacted in some way by tourists and other lifestyle migrants' involvement in such places.

It is difficult to address place and quality-of-life in tourism without discussing lifestyle mobilities and whose quality-of-life might be affected by tourism. To illustrate, consider the case of an iconic tourist destination such as Hawai'i. The Hawai'i we see today is the contemporary product of a long history in which place affinities and attachment have collided with diverse global influences and lifestyle aspirations. And not only do we need to consider how modern tourist visits might contribute to the tourist's quality-of-life, we need to ask: what constitutes quality-of-life for the indigenous Hawai'ian? Or for that matter the American mainlander seeking to retire in his little corner of paradise? Or the counter-cultural free spirit who hopes to transform a hobby into an economically sustainable lifestyle? Or the tourism entrepreneur with visions of turning a former pineapple plantation into a five-star golf resort? These are not just the imagined realities of an idealized Hawai'i. When put into practice, they create the reality of a conflicted and contested place, the Hawai'i we see today. How do we understand quality-of-life for all these different people brought together in this one place? More importantly, how is it that being in this place contributes to quality-of-life, and how does the individual pursuit of quality-of-life affect others' pursuit of quality-of-life?

Our intention is not to focus on Hawai'i per se but to raise a series of questions about the interactions among place, mobility, and globalization and their impact on the ways in which places are created and experienced through tourism and how these processes are driven by and produce quality-of-life for various people. Our approach will be to first discuss place, place attachment, and its relationship to quality-of-life; examine how touristic relationships to place afford individuals opportunities to act out desired lifestyle aspirations as a way to enhance quality-of-life; and explore how enhanced mobility has transformed our perceptions of place and the implications this has for tourism and quality-of-life.

Place and Well-being in Tourism

As an economic activity, tourism trades on the character of places. So, it is natural that tourism research has maintained a longstanding interest in place-related topics such as measuring and marketing destination images (Gartner 1989; Hunt 1975; Uysal et al. 2002), visitors' and residents' experiences of place (Lew 1989; Suvantola 2002; Young 1999), and attachment to

place among tourists (Lee and Allen 1999) and residents (Um and Crompton 1987). Tourism studies on the contribution of place features and affinities to well-being have drawn on two distinct models of well-being. As distinguished by Omodei and Wearing (1990), the telic or goal attainment model views well-being as occurring when specific needs or goals are met. In contrast, the auto-telic or process-based approach examines well-being as arising directly from the nature of activity and from interactions with objects, places, and people rather than from attaining desired end states.

As the dominant model guiding much of consumer, recreation, and tourism research, the telic approach focuses on the contributions of various product or service (e.g., destination) features to well-being (Patterson et al. 1998). Following the telic model, early studies of tourist behavior built on a consumer metaphor in which places were constituted as collections of destination features, each with its own perceived utility in the tourist decision-making process (Gartner 1989; Klenosky et al. 1993). Largely absent in such studies, however, were process-oriented considerations of the meaning the visitor or resident attached to the specific place in which these features were found and how these meanings were produced and consumed (Arnould and Price 1993; Patterson et al. 1998; Young 1999).

Early examples of auto-telic thinking in recreation and tourism research began to surface in the early 1980s as some recreation researchers began to examine how, over time, people accumulate meaning and form emotional ties to specific places (Schreyer et al. 1981), establish “social definitions” and “feelings of possession” (Jacob and Schreyer 1980) about places, and seek out places where the norms of behavior and expressed values and lifestyles match their own (Schreyer and Roggenbuck 1981). The key idea behind this more auto-telic view was that people often value their relationships to tourist places not merely because they were useful settings for pursuing desired activities and experiences, as in the telic approach, but because the specific places involved conveyed a sense of individual identity and group affiliation. Below we examine the relationship between place and well-being organized around three topics: measuring place attachment, the experiential and socio-cultural meanings of touristic places, and how tourist relationships to place have brought with them increasing consideration of the nature and role of mobility in quality-of-life.

Place Attachment

Building on the critiques on place coming out of humanistic geography (e.g., Tuan 1977) as well as critiques of the telic approach to consumer behavior in both recreation/tourism and consumer studies (e.g., Holbrook and Hirschman 1982; Olshavsky and Granbois 1979), Williams and colleagues initiated an effort in the late 1980s to develop a psychometric instrument that could measure the strength of place attachments for use in public surveys of recreation visitors to national parks, forests, and other wildland and tourist destinations (Williams et al. 1992; Williams and Vaske 2003). The design of the original scale built on Brown’s (1987) suggestion of two forms of place attachment. One was Stokols and Shumaker’s (1981) the concept of place dependence, which represented the importance of a place in providing features and conditions that support specific goals or desired activities. The other was the concept of place identity (Proshansky 1978; Proshansky et al. 1983), which refers to the importance of a place in constructing and maintaining self-identity (for a more detailed discussion of these two components of place attachment, see Farnum et al. 2005). Others have since argued for and tested other possible subcomponents (e.g., Hammitt et al. 2009).

Over the years, similar instruments have been employed in various tourist contexts including visits to national parks and other resort destinations (Alexandris et al. 2006; Bricker and Kerstetter 2000; Gross and Brown 2008; Hou et al. 2005; Hwang et al. 2005; Kaltenborn and Williams

2002; Kyle et al. 2005; Lee and Allen 1999; Warzecha and Lime 2000; Yuksel et al. 2010), owners of vacation homes (Jorgensen and Stedman 2006; Kaltenborn 1997; Kaltenborn et al. 2008), and residents of tourist regions (Kaltenborn and Bjerke 2002; Kaltenborn and Williams 2002; Lee et al. 2010; Matarrita-Cascante et al. 2010; Williams et al. 1995).

In terms of quality-of-life, the key idea was that tourists derived value from their experience, not simply by virtue of the presence or absence of preferred destination attributes, but because the place provided meaning and a sense of identity or purpose to life (Williams et al. 1992). However, the focus of place attachment research in tourism has not been its direct contribution to well-being. Part of the reason is that place attachment has been used as both a predictor (explanatory) variable and dependent (criterion) variable. As a predictor variable, it is common to examine how attachment influences specific perceptions of destinations (Hwang et al. 2005; Yuksel et al. 2010) and their management (Kyle et al. 2004; Vorkinn and Riese 2001; Watson et al. 1994). Yuksel et al. (2010) found statistically strong and meaningful links between place attachment dimensions and visitor satisfaction. They argue against what they call the “traditional view” in which destination satisfaction leads to attachment, and suggest a more complex relationship in which satisfactory visitor experiences reinforce place dependence, “which in turn affects the development of place affect and place identity as layers of memories and place-specific meanings” (p. 282). In a study of visitors to a national park in Taiwan, Hwang et al. (2005) found that both involvement and place attachment had positive effects on service quality and satisfaction.

As a criterion variable, attachment is often assumed to be a positive indicator of well-being (but see Manzo 2003 for a critique of this assumption). Investigators have typically sought to explain attachments based on experiential, environmental, and/or socio-cultural determinants. With respect to experiential determinants, studies show that attachments generally involve experiential investments that develop over time (George and George 2004; Hammitt et al. 2004; Moore and Graefe 1994; Smaldone 2006; Smaldone et al. 2008; Williams et al. 1992). Still, while some have argued that place attachment may not necessarily require direct experience with the place (Farnum et al. 2005), others have shown that what distinguishes place attachment from ordinary preference for one place over another is that attachment to a place is something that builds over time (Smaldone et al. 2008).

Others have looked at how destination features influence attachment, particularly the relative importance of natural versus cultural features (e.g., Beckley 2003; Brehm et al. 2004; Stedman 2003). Some have even pointed to psycho-evolutionary theory to posit an innate human disposition to form attachments particularly to natural environments (Farnum et al. 2005). By such reckoning, an instinctive liking of an environment (e.g., nature) is tantamount to attachment. But this assumption is hard to reconcile with experientially based notions of attachments (as noted above) and studies showing that people form strong emotional attachments to intensely urban places (e.g., Fried 1963, 2000). Likewise, to assume that there are robust if not universal environmental attributes to explain place attachment makes it difficult to differentiate the concept of attachment from multi-attribute utility explanations for environmental preferences used in economic, consumer, and attitudinal theories – the very approaches to environmental preference that humanistic geographers such as Tuan found lacking in the first place (Williams and Patterson 2007).

Whereas in studies of destination visitors the connection between attachment and experience quality is often assumed, the relationship between attachment and quality-of-life is somewhat more explicit in studies of the residents of tourism destinations. Most studies at least focus on the relationship between attachments and attitudes toward tourism and/or perceptions of the impacts of tourism. In an early study examining the influence of resident attachment toward tourism, McCool and Martin (1994) hypothesized that residents with strong feelings of attachment would have negative attitudes toward tourism. They found a significant correlation between community

attachment and level of tourism development among Montana residents. They also found that attached residents rated positive dimensions of tourism more highly and also were concerned about sharing the costs of tourism development. Jurowski et al. (1997) used a path model to examine the relationship between community attachment and support for nature-based tourism. They found that attached residents appear to evaluate the economic and social impacts of tourism positively while evaluating the environmental impacts negatively.

Several studies have attempted to broaden traditional rural sociological concerns for community attachment to look at social and environmental factors related to well-being in amenity-rich communities that attract a lot of tourism. Matarrita-Cascante et al. (2010) noted how landscape-based factors make an independent and important contribution to community attachment both for permanent and seasonal residents. Brehm et al. (2004) examined the social, cultural, and physical qualities of a community that facilitate open communication and collective action. They found that social attachment and attachment to the natural environment are distinct dimensions of community attachment with community well-being explaining significant but small variance in attachment to both dimensions. Examining both residents and tourists, Kaltenborn and Williams (2002) reported that attachment had a positive effect on how both residents and tourists valued place and features and attitudes toward the protection of a world heritage site in Norway. In a study of attachment to local heritage, Gu and Ryan (2008) found that concerns about the negative impacts of tourism on a local heritage district in Beijing outweighed the perceived advantages of tourism for economic development.

A key point of discussion has been the relationship between place attachment and other place concepts such as place meanings and sense of place (Patterson and Williams 2005). In particular, it is common to see investigators invoke some notion of sense of place and then operationalize and measure something closer to place attachment (Jorgensen and Stedman 2001; Shamai and Ilatov 2005). Alternatively, some have directed criticism at place attachment for failing to address issues and topics more suited to the notion of sense of place or place meanings (Farnum et al. 2005; Stokowski 2008). Place attachment seems particularly well suited to measuring the strength of personal emotional bonds (e.g., meaningfulness or sentiment) and the individual differences in the strength of attachments to specific place. To study something more multifaceted as sense of place or the individual and socio-cultural meanings that go with a place, many have turned to more qualitative and interpretive methods. The focus of such studies has been to examine how place relationships are an important part of touristic experiences and how they contribute meaning, stability, and identity and ultimately enhance well-being.

The Experiential and Socio-cultural Construction of Touristic Places

Recognizing some of the limits of the telic approach as well as the difficulties of place attachment measures to probe the depth of meaning for a place, experiential and socio-cultural studies of place have examined touristic experiences as part of an ongoing enterprise of constructing an identity (Patterson et al. 1998) – something actualized through a transactional relationship between the person and the place (McIntyre and Roggenbuck 1998; Smaldone et al. 2005). Through everyday spatial interactions, people create and sustain a coherent sense of self, reveal that sense to others, and derive a benefit such as enhanced self-esteem (Williams and McIntyre 2001).

Following the auto-telic approach to well-being, pioneering studies of tourist experiences of place found that building an experience narrative made an essential contribution to overall satisfaction (Arnould and Price 1993; Patterson et al. 1998). Patterson et al. (1998), for example, collected experiential narratives (descriptions of the experience in participants' own words) from people who had taken a canoe trip down a slow-moving, spring-fed creek in a Florida wilderness area.

They found that experiences often had a storied quality, best understood in terms of an emergent narrative rather than a set of expectations. That is, rather than having a precise set of specific goals, many tourists seemed motivated by a not very well-defined purpose of acquiring stories that ultimately enrich their lives. In addition, some respondents clearly had a more enduring relationship to place, one so strong that being considered a “visitor” or “tourist” seemed like a mischaracterization of how the place related to their well-being.

Other studies emphasize the importance of the person-place transaction that plays out over time. Some studies have emphasized the temporal dynamics of a single visit (McIntyre and Roggenbuck 1998; Vogt and Stewart 1998); others have looked at how the meanings of a place evolve over the life course, marking significant changes in peoples’ lives (Brooks et al. 2006; Smaldone et al. 2005). In a study of a unique experience of rafting through a dark cave, McIntyre and Roggenbuck (1998) noted how person-nature transactions involved shifting foci of attention, mood states, and perceptions of risk and competence such that the place provided a context or frame within which individuals were empowered to shape their own experiences. Smaldone et al. (2005) used interviews with tourists and residents of Jackson Hole, Wyoming, to show how life stage influenced how places become meaningful, as well as why place meanings change, how place meanings and experiences are used to regulate people’s emotions and self-identity, and the sacrifices people make to maintain place experiences.

Socio-cultural studies of place also examine the social processes of place making as embedded within the cultural, historical, and geographical context of day-to-day life (Farnum et al. 2005). As social beings, people seek out and create meaning in the environment. Accordingly, any single environmental feature may be perceived from a variety of social or cultural perspectives. For example, a Hawai’ian holiday may offer a variety of touristic experiences from relaxation and contemplation to competence testing. But to nearby residents, Hawai’i may symbolize ancestral ways of life or an essential livelihood. Thus, the place acquires varied and competing social and political meaning as a specific locale becomes associated over time with particular activities, interests, and social groups (Young 1999). In addition, research is beginning to examine social and cultural differences in access to the economic and political resources necessary to define and direct the use of touristic settings – the basis of much inter-group conflict (McHugh 2006a; Stokowski 2002).

Socio-cultural studies of place emphasize the way landscape features and settings are symbolically constructed as touristic places (Blake 2002; Stokowski 2002; Suvantola 2002), both through the meanings ascribed to them by tourists and local residents and by the intentions of designers, developers, and promotional and managing agencies (Saarinen 1998; Schöllmann et al. 2000; Young 1999). As a result, tourist places are subject to complex, contested social processes in which various stakeholders struggle to manipulate and control place meanings, values, and uses (Carter et al. 2007; Kneafsey 2000; Malam 2008; McHugh 2006a; Williams and Van Patten 2006). This perspective is proving increasingly valuable to policy makers as they try to balance the competing environmental priorities of diverse constituencies (Dredge 2010; Kianicka et al. 2006; Kerstetter and Bricker 2009; Paradis 2000; Puren et al. 2007). Thus, for managing parks, protected areas, and other tourism destinations, tourism has the potential to be both a stabilizing force in protecting landscapes and local culture, but is also a potential vehicle for their degradation (Williams 2001).

Place, Mobility, and Multi-centered Identities

A particularly germane context for investigating quality-of-life in tourism involves the study of people who seek to be mobile and rooted at the same time including itinerant retirees who

wander about the countryside driving or towing their homes (e.g., recreational vehicles (RVs), “fifth wheel trailers,” etc.), people who regularly migrate with the seasons, and second-home tourists who exemplify the development of long-term affinities for multiple places through repeated use of holiday residences (Gustafson 2001; Hall and Müller 2004; Lippard 1997; McHugh et al. 1995; McIntyre 2006). These temporary, periodic, and cyclical migrations often flowing from cooler climates and urban centers to warmer climates and rural, amenity-rich areas provide a dynamic context for studying how place and mobility are negotiated in modern life and how multi-place bonds unite and divide communities (McHugh 2006a).

With rare exceptions (see McHugh 2006b), most of the work on multiple dwelling either focuses on fixed recreational homes or does not distinguish between types of dwellings (mobile RVs versus conventional dwellings). One consistent theme in this line of research, however, is the idea of escaping modernity. As McHugh (2006b) notes, one of the largest RV clubs is named *Escapees*. In comparing seasonal residents with year-round residents, Stedman (2006a) also noted that seasonal residents often describe their home as a place of escape from civilization. Likewise, McIntyre et al. (2006a) described relationships to second homes as falling along a continuum whereby some seasonal homes were experienced as part of the “home range” providing a complementary lifestyle of routine and familiarity whereas use of more distant seasonal homes allowed for a more compensatory meaning of escape associated with being away.

In a study of British seasonal homeowners in rural France, Chaplin (1999) argued that people use seasonal homes to escape from the ubiquitous commodification of modern life and that owning a seasonal home was a kind of “identity project” used “reflexively” (Giddens 1991) to subvert the process of commodification. Similar to Chaplin, Williams and colleagues (Van Patten and Williams 2008; Williams and Kaltenborn 1999; Williams and McIntyre 2001; Williams and Van Patten 2006) also looked at owning second homes as a kind of identity project. Specifically, they drew from Giddens’ discussion of four crucial identity dilemmas people must negotiate to construct coherent identity narratives: efficacy versus powerlessness, personalization versus commodification, authority versus certainty, and fragmentation versus unification.

First, holiday homes give individuals greater efficacy in shaping lifestyles and meanings from a diverse range of possibilities for building one’s identity narrative. The sense of escape from daily life restores feelings of self-reliance and control over one’s own schedule which is otherwise undermined, as Giddens (1991) argues, by globalization and its expanding dependence on abstract systems of expert control.

Second, the holiday home offers a way to balance personalization with commodification. On the one hand, our personal appropriation of life choices and meanings is often influenced by standardized forms of consumption with their pre-packaged images and storylines. But rather than passively consuming these standardized narratives, people actively discriminate among pre-packaged images and modify pre-fabricated storylines to suit their individual tastes. As Tuulentie (2006, 2007) shows from her study of Finnish holiday homes, cumulative experiences in a holiday destination afford the long and practiced commitment to certain lifestyle that gives life a sense of purpose.

Third, the continuity and sense of rootedness made possible by a life-long accumulation of experiences in a place illustrate how holiday residences help people negotiate identity dilemma of navigating between authority and uncertainty. As Giddens (1991) suggests, the dilemma arises from greater uncertainty as to what constitutes worthy sources of authority in the modern age. This dilemma may be partly resolved “through a mixture of routine and commitment to a certain form of lifestyle” (Giddens 1991, p. 196) as holiday homes offer family members a regular gathering place for maintaining routines and traditions and help to forge a shared commitment to a place in what for many is otherwise experienced as rootless modern life.

Fourth, though holiday homes offer a seemingly thicker place of identity, continuity, and tradition, there is a contradiction as suggested by Giddens’ final identity dilemma of

fragmentation versus unification. Owning and visiting a holiday home adds to quality-of-life by emphasizing a continuity of time and place, a return to a simpler life, and convergence of spheres of life such as work and leisure. At the same time, holiday homes reinforce the segmented quality of modern identities in the form of separate places for organizing distinct aspects of a fragmented identity around different segment of life (e.g., work versus leisure) as well as around phases in the life cycle with youth and retirement focused more on the holiday place compared to working adulthood.

The efforts of itinerant RV residents, tourists, and second-home owners to weave together coherent but multi-centered identities heighten the challenges of accommodating both distant and locally defined place meanings. While perhaps sharing a deep attachment to place, locals and tourists are likely to hold different myths of authenticity and pursue diverging ideas of how to sustain quality-of-life in a given place. The tourists may seek to preserve some “rustic idyll” (nature, refuge, and simple living) against the forces of modernity. The locals, in contrast, may need to continuously adapt the place to sustain their livelihoods if not their lifestyles.

Thus far, we have examined place-based affinities and meanings associated with tourism as providing opportunities to establish and express individual identity, maintain a coherent self-narrative, and provide a sense of rootedness even in the face of globalization and the seeming dilution and thinning of place-based meanings (Giddens 1991; McIntyre 2006). Ironically, tourism also suggests that greater mobility enables a wider search for deeper place meanings and stronger ties to place. For Giddens, constructing an identity in the modern, globalized age is a difficult prospect as it must be accomplished amid a greater diversity of lifestyle options, competing sources of authority and expertise, and extensive access to a multitude of places thoroughly penetrated by distant global influences. It is these lifestyle options, what we term lifestyle mobilities, to which we now turn.

Migration, Mobilities, and Quality-of-Life

Tourism is not just about a destination; it also implies a journey. Historically, questions about mobility have focused on migration and in particular the permanent movement of people motivated dominantly by economic concerns (Roseman 1992). However, more recent research has emphasized a more nuanced perspective on migration and mobility. In particular, the view that migration may include a much broader range of motivations including quality-of-life considerations and that it may be temporary or cyclical in nature has gained more prominence in the literature (Bell and Ward 2000; McHugh et al. 1995; Williams and Hall 2002). Tourism can thus be conceptualized as a temporary or cyclical form of migration and placed on a time/space continuum with other types of human movements of varying duration from daily trips (e.g., shopping, commuting, and visiting) through those of longer duration (e.g., vacations, staying at a second home) to permanent relocation, all of which can be viewed as part of this continuum of migratory activities (Hall 2005). In this perspective, tourism in its multiple forms is embedded in the lifestyle practices of an increasingly mobile society. As such, it is freed from the strictures of “overnight stays” and “home and away” (Shaw and Williams 1994) and becomes more broadly a site of experience and meaning. Williams and Hall (2002) differentiated two broad motives underpinning temporary or cyclical migration, namely “productive” (work or business-related) and “consumptive” (lifestyle). The latter categorization includes tourists and the former tourism workers, although here the distinction becomes somewhat blurred when one considers, for example, peripatetic tourism workers in the ski or surfing industries (Adler and Adler 1999) and lifestyle entrepreneurs (Dewhurst and Horobin 1998) who combine both work and lifestyle.

Consumptive motivated migration can be subsumed under the broader categorization of amenity or lifestyle migration as the “the movements of people to places that they perceive as having greater environmental quality and differentiated culture and that are perceived as providing an enhanced or, at least, different lifestyle” (adapted from Moss 2006, p. 3; McIntyre 2009, p. 4). This type of migration (Fig. 12.1) includes traditional permanent relocations (e.g., retirees) (see Williams et al. 1997, 2000); temporary, cyclical, and recurrent movements of tourists (e.g., second-home owners) (see Hall and Müller 2004; McIntyre 2006); peripatetic tourism workers (Adler and Adler 1999); and permanent relocations associated with lifestyle entrepreneurship (Shaw and Williams 2004; Stone and Stubbs 2007).

Mobility, thus, not only describes the tourists but also characterizes a significant portion of people engaged in the tourist trade. The tourism industry is often based on entrepreneurship and dominated by small- to medium-sized enterprises (SMEs) run by individuals with a few employees, often family members (Peters et al. 2009). Entrepreneurship is conventionally viewed as motivated primarily by economic considerations, but research particularly in tourism has uncovered a different kind of entrepreneur – the lifestyle-oriented entrepreneur (Ateljevic and Doorne 2000; Dewhurst and Horobin 1998). A disproportionate number of SME owners in the tourism industry are motivated by a mix of both lifestyle and economic concerns, and not uncommonly, the former prevails in business decision-making. Ateljevic and Doorne (2000), in a study of lifestyle entrepreneurs in the outdoor adventure and backpacker hostel industry in New Zealand, noted that:

... a growing number of small-firm owners electe[d] ... to preserve both their quality of life in their socio-environmental contexts and their ‘niche’ market position [by] catering for travellers similarly seeking out alternative [business] paradigms and ideological values ... of reciprocity and lifestyle. (pp. 388–9)

Also, in a 1997 UK study of tourist SMEs (reported in Shaw and Williams 2004), some 80% of respondents privileged lifestyle over economic motives.

The preponderance of such lifestyle entrepreneurs is particularly characteristic of tourism because of its relatively low entry requirements and the blurring of the boundary between consumption and production (Shaw and Williams 2004), in that many SME owners were former tourists to a region and/or were formerly or are still active participants in the focus of their business enterprise. For example, Shaw and Williams reported in a study of the surfing industry in Cornwall, UK, that small-business owners in the surfing industry were attracted to the industry because it enabled them to create a better quality-of-life by managing or participating in a business associated with their “passion.”

In a recent study of migrants to France and Spain, Stone and Stubbs (2007) noted that owners of SMEs were generally expatriates who had a pattern of recurrent visits to a particular area, many of whom had migrated initially for lifestyle reasons and later started a business as a mechanism to allow them to continue living in their chosen destination; others were returned migrants with family ties and inherited property. Similarly, in UK coastal towns, the majority of tourist enterprises were run by people from outside the area who had moved there with the specific purpose of setting up a business in a preferred locality, “to be their own boss” and to seek a better quality-of-life in what they considered to be a high-quality environment (Shaw and Williams 2004). A common feature of all these types of migrants was an emphasis on balancing quality-of-life considerations including the natural environment, family time, freedom, a slower pace of life, and community involvement (Ateljevic and Doorne 2000; Marcketti et al. 2006; Tate-Libby 2010) with economic self-sufficiency (Peters et al. 2009).

As alluded to in the previous section, an important distinction is drawn in Fig. 12.1 between the “passing trade” tourist (McIntyre 2006) and the second-home tourist where the latter differs in that he/she has a history of property ownership in and repeat visits to a destination. Some authors (e.g., Stewart 2001; Tuulentie 2006, 2007) have indicated that tourism experiences can lead to second-home purchase and perhaps eventually to permanent residence in the amenity destination.

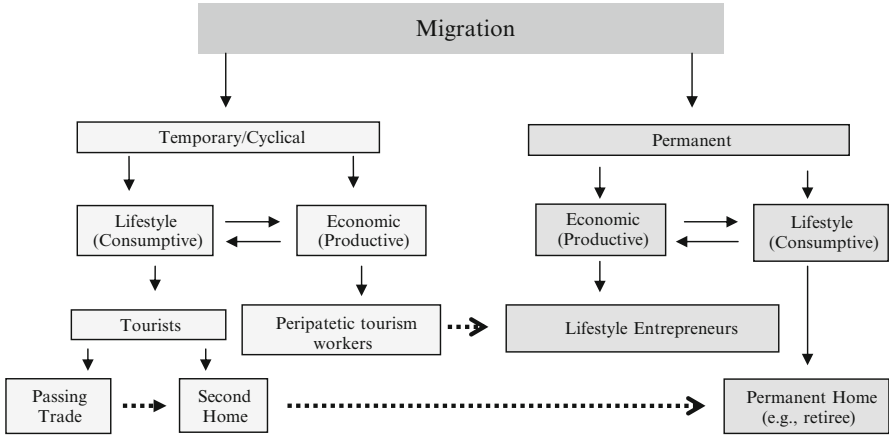


Fig. 12.1 Tourism and amenity (lifestyle) migration (After McIntyre 2009, p. 5)

Figure 12.1 draws another distinction, namely that although migration or the movement of people is a major component of mobility, it is nonetheless only one of a number of “mobilities” that Urry (2000) recognized. He argued that to understand the complex and surprising nature of the world today, there was a need to explore “the diverse mobilities of peoples, objects, images, information and wastes; and the complex interdependencies between, and social consequences” (p. 1) of their interactions. In this light, McIntyre (2009) introduced the term *lifestyle mobilities*, which he defined as “the movements of *people, capital, information and objects* associated with the process of voluntary relocation to places that are perceived as providing an enhanced or, at least, different lifestyle” (p. 4). In the context of tourism, this perspective necessitates consideration of the broad array of mobilities or flows that are associated with tourist activity including the movements of money, culture, technology, and information which accompany and support this activity. In characterizing this type of mobility, the term *lifestyle* is preferred to *amenity* because the former includes not only the amenity or objects of attraction but also the ultimate goals of relocation, namely, enhancing or changing lifestyle and potentially redefining the self.

Much like Giddens’ identity dilemmas discussed earlier, lifestyle mobilities have been linked to enhanced quality-of-life (Gustafson 2006; Johnson and Rasker 1995; Moss 2006). Integral to this linkage is choice, the freedom to select from the multiplicity of lifestyle models and places presented through marketing and other forms of mediated expression. Although advances in transportation and communication technologies, more flexible working arrangements, and increases in discretionary wealth and time have led to enhanced personal mobility worldwide, it is also recognized that such freedom is related centrally to privilege and opportunity and is not universally accessible (Gustafson 2006).

Mobilities

Mobilities imply more than the movement of people; they also include the movement of capital, information and imagination, and skills and knowledge of the tourist, lifestyle migrant, or multiple dweller (Appadurai 2008; Urry 2000). In the context of tourism, a significant aspect of these latter types of mobilities is their influence on the distribution or (re)-distribution of the benefits arising from tourism activity and the often conflicting meanings attached to places.

The idea that tourism is very much about the (re)-distribution of capital and wealth from the center to the periphery is hardly new. This is the main reason why tourism is viewed as a major engine of economic development in many transitional and economically depressed regions of world. Frequently and especially in the case of less-developed destinations in the south, the disparities in wealth between visitors or new lifestyle migrants and the local populations are significant. Indeed, the perception that visiting or taking up residence in a particular place will make the tourist dollar “go further” or enable the retirement dollar to purchase a better quality-of-life is often a major reason for choosing a particular destination. However, while (re)-distribution of wealth may be a major aim of tourism development, at least in the eyes of the host community or nation, the actuality of this (re)-distribution and the extent to which it actually contributes to improving the quality-of-life of those most in need is a matter of considerable debate.

A case in point is the debate surrounding the so-called pro-poor tourism movement. Pro-poor tourism seeks to exploit tourism’s potential to alleviate poverty in host communities and nations by generating net benefits for the poor (Ashley et al. 1999). However, the weak bargaining power of host communities and nations vis-à-vis the tourism hegemony of international airlines and tourist operators (Chok et al. 2007) means that much tourism development in the developing world often benefits multinationals or “elites” in the host nation who are:

...enabled to repatriate profits, import goods from the economic [centers] to cater for the international visitor market, and employ expatriates for high-skills positions [which] results in high levels of economic leakage and minimises tourism’s potential benefit to the host country’s local economy – and ‘the poor’ within it. (Schilcher 2007, p. 171–172)

The commercial reality of tourism limits the extent to which it can be made pro-poor (Ashley et al. 2001), and the emphasis on net benefits implies that some poor people may win and others lose. Some argue that what is required to really benefit the “poorest” is a focus on the goal of “(re)-distributive justice” (Reid 2003; Chok et al. 2007), which leans more toward protectionism and local control than the countervailing neoliberal philosophy of openness and self-regulation promoted by such funding agencies as the World Bank and IMF (Schilcher 2007). However, the extent to which local control is possible is questionable given that tourism of necessity “tends to flourish in an open economic environment that facilitates the free movement of capital, labour and consumers” (Schilcher 2007, p. 170). Thus, the essential nature of tourism as a global industry seriously constrains national governments’ attempts to enhance the equitable distribution of benefits through strategies that favor protectionism or regulation.

The emphasis on the mobility of capital or financial benefits arising from tourism in this discussion does not imply that (re)-distribution of these assets is the only issue facing pro-poor tourism and its ability to enhance quality-of-life. It is essential that tourism be set in the broader context of livelihood enhancement and sustainability goals (Chok et al. 2007; Saarinen et al. 2009). This would recognize the need to address place-specific issues such as education, skill development, engagement, and governance – particularly control over and access to natural resources – all of which are central to community participation in tourism and enhancing life quality of host communities.

Imagined Worlds

A key way in which mobility is manifest is in the creation and consumption of imagined worlds (i.e., senses of place, and place meanings and attachments) which are mobilized through processes of imagination. The role of imagination is well recognized in art myth and legend and has acted throughout time to “both transcend and reframe ordinary social life” (Appadurai 2008, p. 5).

What is different today is that imagination has broken out of art, myth, and legend and entered ordinary life. In our media-saturated, mobile world, “anything is possible”:

More people than ever before seem to imagine routinely the possibility that they ... will live and work in [or travel to] places other than where they were born: this is the wellspring of the increased rates of migration at every level of social, national and global life. (Appadurai 2008, p. 6)

Appadurai (2003) points to what he considers a “critical and new... global cultural process: the imagination as a social practice” (p. 29). He argues that:

... the imagination has become an organized field of social practice ... and a form of negotiation between sites of agency (“individuals”) and globally defined fields of possibility. (p. 30)

The building blocks of what Appadurai (2003) termed “imagined worlds... the multiple worlds that are constituted by the historically situated imaginations of persons and groups spread around the globe” (p. 31) are five dimensions of global culture, namely, ethnoscap (mobile people: tourists, immigrants, refugees, etc.), technoscap (mobile technology), finascap (mobile global capital), and mediascap and ideascap (mobile images and ideologies). A key aspect of this thesis is that today, the world is characterized by disjunctions or disconnections between the rapidly changing flows of people, technology, capital, images, and ideas interacting in complex and unpredictable ways in any particular context.

As has been argued previously, the desire for an improved lifestyle or enhanced quality-of-life is a key driver of migration. In this regard, the notion of imagined worlds is important in understanding the processes that are instrumental in motivating people to visit places, create a second residence, or even settle permanently. The particular combination of ethnoscap, finascap, and technoscap affecting an individual at any point in time will strongly influence the ability to move and the conditions under which any such movement will take place. A case in point would be the disparities between an affluent, young German heading to Australia on holiday and a South-Asian boat-person focused on that same target. While the imagined world of Australia constructed by each from print and visual media (mediascap) may be similarly unrealistic, as “assessed by the criteria of some other perspective, some other imagined world” (Appadurai 2003, p. 34), the lens (ideascap) through which they each view the target is radically different. Australia represents freedom from political repression and economic hardship for one and an exotic experience and temporary separation from everyday life for the other.

The potent mix of personal mobility fuelled by modern electronic media provides a wealth of “imagined worlds” which are the foundations of tourism and lifestyle mobility. Tourism destination marketing is designed to communicate an imagined world that is attractive to individuals in specific target audiences, thus creating a “community of sentiment... a group that begins to imagine and feel things together” (Appadurai 2003, p. 8). Destination marketing can be seen as an ideascap – a mix of visual and print narratives presenting a sanitized, often romanticized, perhaps even ideological sense of place designed specifically to entice tourists and lifestyle migrants. Quality-of-life markers are central components of such ideascapes. Typically, they depict healthy, affluent retirees or elegant, physically attractive, and young people indulging in the best food and accommodation, enjoying active pursuits in perfect weather and in aesthetic, romantic, and often natural surroundings involving interactions with wildlife or intimate contacts with stereotypical local people.

Not unusually, these idealized images often conflict with the lived reality of tourist places. In amenity/tourism towns in rural areas, competition over housing and services, overcrowding, traffic, cost of living, and loss of amenity and access have led to perceptions of diminished quality-of-life in some sections of resident populations (Glorioso and Moss 2007; Gober et al. 1993; Gurran 2008; Hansen et al. 2002; Jobes 2000; Loeffler and Steinecke 2007; Stefanick 2008). Multiple dwellers often react negatively and even obstruct resource or other developments which they view as in conflict with their imagined worlds of bucolic or pristine nature. Similarly, in

developing nations, rather than improving the life quality of residents, the types of tourism that have developed, notably “enclave tourism,” have in many cases exacerbated poverty by alienating traditional lands for tourism development, excluding opportunities for local involvement, repatriating tourist earnings, and encouraging the growth of sex industries and the spread of HIV/AIDS (Kibicho 2009; Mbaiwa 2005).

Paradise Found, Paradise Lost: Mobilities and Imagined Worlds

The increasing pervasiveness of tourism and the resulting competition between destinations, and its close association with economic development draw small communities, cities, and countries inexorably into a cycle of self-promotion to attract the tourist or retirement dollar. Central to this endeavor is capturing the imagination of potential markets through the construction and dissemination of desirable experiences and lifestyles. However, as indicated above, the dilemma associated with the success of this self-promotion is a threat to the very qualities upon which the lifestyles and experiences enjoyed by locals and promised to visitors depend.

Doxey (1976: referenced in George, et al. 2009) proposed four stages of development of locals’ attitudes to tourism: initial “euphoria” as economic possibilities in often depressed communities are enhanced by tourism development; “apathy” where tourists and other lifestyle migrants are essentially taken for granted; “annoyance” with the impacts on quality-of-life, initiating the formation of local protest groups; and finally, “antagonism” where most of the problems of the community are blamed on tourists and lifestyle migrants.

Various authors (e.g., Blahna 1990; Fortmann and Kussel 1990; Jones, et al. 2003; McIntyre and Pavlovich 2006; Thompson 2004; Williams and Van Patten 2006) have noted much common ground among residents and in-migrants in appreciation of and concern for the amenity landscape. Despite these similarities in resource and/or tourism-related developments, there remains a consistent focus of conflict in amenity communities. Most commonly, protagonists in these conflicts are divided into in-migrants and locals (e.g., Gallent and Tewder-Jones 2000; Hall and Müller 2004; Stedman 2006b). However, research is pointing increasingly to the need for a more nuanced view of such complex and contentious situations (George et al. 2009; Milne 2001). The imagined worlds within and among locals, tourists, and multiple dwellers often differ, thus creating a complex and often conflicting mix of visions of how a place is and should be. Such “communities of sentiment” are often mobilized in collective action as a result of perceived threats to the integrity of their various imagined worlds produced by tourism or resource development. In such situations, ideascapes, which define both the imagined worlds of mobile newcomers and those of the emplaced traditional inhabitants, can variously conflict and align as controversial situations develop.

Prior to any proposal, be it for tourism or for resource development, the various imagined worlds may be largely subliminal, co-existing in an uneasy but generally amicable climate, occasionally manifesting themselves in minor conflicts over untidy, run-down homes, unruly dogs, illegal burning, and disrespect for cultural artifacts and local customs (Tate-Libby 2010). However, development proposals and the ensuing political controversy raise the various versions of a place into consciousness necessitating their articulation and differentiation by exaggerating distinctions, denigrating opponents, and emphasizing negative aspects of opposing ideascapes (Ramp and Koc 2001; Satterfield 2002).

Milne (2001) argued in relation to development controversies on the Sunshine Coast of British Columbia that:

... opinions regularly divide according to people’s views ... on the need to develop vs the need to conserve ‘nature’; and on the transition from a ‘traditional’ to a ‘new economy’. (p. 200)

Thus, in many such disputes, there are those whose imagined place is based on preservation or conservation of former lifestyles and traditions and natural and cultural heritage (Dredge 2010; George et al. 2009; Tate-Libby 2010). Examples include the efforts of the Lunenburg Waterfront Association Incorporated (LWAI) to retain the remainder of the historic waterfront of Lunenburg, Nova Scotia, Canada, as a “working waterfront” which the LWAI argued is central to “[E]very aspect of Lunenburg’s economy, identity and culture and its appeal as a place to live and work” (George et al. 2009, p. 59). A second example involves the controversy over the proposal to develop a cruise ship terminal on the northern tip of the Southport Spit in Queensland, Australia – “one of only two semi-natural coastal environments left on the Gold Coast” (Dredge 2010, p. 108). The three protagonists in this latter conflict were the “Save our Spit” (SOS) public action group, the Gold Coast Marine Development Project Board (consultants, engineers, economic development officers, developers, and one community representative), and the Queensland State Government. A third example involves the Ka’u Preservation made up of native Hawai’ians and local activists who strongly advocated the preservation of the Punalu’u Black Sand Beach in the southern part of the Big Island (Hawai’i) from a proposed resort development. The Ka’u Preservation proposed a return to the “old ways” including the development of a cultural center to educate young people and tourists about the traditions and culture of old Hawai’i, which they argued would provide a more dignified and appropriate form of employment for the local people. Also, such an enterprise would enable the local community to capture a significant proportion of the tourism revenue currently generated in the area but accumulated elsewhere (Tate-Libby 2010).

On the other side of the debate are those whose imagined worlds are centered on the opportunities for employment, real estate investment, and the business opportunities that tourism development potentially offers. This was very evident in the Lunenburg and Ka’u, Hawai’i, examples where strong constituencies among residents favoring the proposed developments existed.

In the mature phase of a tourist destination (Butler 2006; Hall and Williams 2002), the mix of residents both permanent and temporary becomes more complex as lifestyle migrants (e.g., retirees, second-home owners) and lifestyle entrepreneurs become a significant proportion of the migrant population. This more complex mix of residents exacerbates the potential for conflict over proposed tourist or other developments by enhancing the likelihood that any such developments will be seen as compromising aspects of the increasingly multiple visions of place.

In the Ka’u case cited above, retirees and second-home owners were active in the resident group advocating for the tourist development on Punalu’u Black Sand Beach because of the potential for job creation for local people, the enhanced amenities it would provide, and a fear that beach access would be restricted by the Ka’u Preservation group. This contrasts with the often significant resistance by second-home owners to resource developments which conflict with idyllic visions of rurality (Williams and Hall 2002; McIntyre 2006) and the “fortress mentality” of Sun City, Arizona, retirees discussed by McHugh (2006a).

Like retirees and second-home owners, lifestyle entrepreneurs are often of upper middle class and well educated, have a strong commitment to their chosen destination, and are often vocal and well-organized participants in development controversies. In some cases, this is manifested in taking a leadership role in coalition with residents in opposing a particular development which they perceive as compromising their strongly held views on preserving local culture and/or nature (e.g., Ateljevic and Doorne 2000; Tate-Libby 2010).

At root, Milne (2001) argues that underlying all these conflicts

... there is a central tension which is seldom made explicit: between support for urban types of development, and resistance to development that is grounded in a valuing of the rural and what this place ... has been in the not too-distant past. (p. 200–201)

“Urban types of development” are commonly referred to as “urbanization” which, in this context, connotes not the spread of cities but rather the infusion of “urban lifestyles” into rural

areas as a function of enhanced mobilities, leading to what has been termed “gentrification” (George et al. 2009; Whitson 2001). This effect is manifested in the displacement of residents and traditional industries and the up-scaling of former resource complexes (e.g., waterfronts), historic areas, and resource communities by in-migration of affluent buyers from more prosperous, usually urban locales (George et al. 2009). These changes bring the cappuccino bars, up-market restaurants and bookshops, state-of-the-art outdoor gear stores, and the shopping malls and chain stores to former mining or agricultural communities. Such developments are welcomed by some because they enhance their quality-of-life by creating a more interesting and diverse place to live and provide new employment and business opportunities that attract in-migrants and enable young people to remain in the community. They are also decried by others, who mourn the loss of the local culture and ambience of life in a traditional fishing or mining community (Whitson 2001).

The preceding discussion has used the term *community* uncritically, but what the examples discussed above have revealed is that the reality of community is far from the ideal “homogeneous entity containing a singular mind”:

... [rather] community may act quite like the individuals that comprise it; complex, conflicted and concerned over the many issues they encounter at any single period of time. (George et al. 2009, p. 162)

This implies a singular and important role for government and its planning authorities tasked with facilitating tourism development in communities. A key role of government is mediating conflict situations to protect the public interest (Dredge 2010). This begs the question as to how “the public interest” is operationalized in the often conflictual situations surrounding major tourism developments. Dredge has argued that most policy debates tend to exclude attention to public interest, and where it is mentioned, it is generally couched in terms of the broader notions of public benefits – “[a]s a result, the legitimacy of certain decisions can be questioned and trust in government can be affected” (p. 105).

Dredge (2010) recognized four perspectives on public interest: the rational, the neoliberal, specific interest, and participative. However, she found in her Australian case study that an emphasis on a combination of the neoliberal (domination by market forces and corporate interests) and the specific interest (preferences of governing elites such as developers/entrepreneurs) perspectives on public interest (jobs and economic development) significantly reduced the potential for a genuinely participative process involving local citizens. Similar situations are evident in Canada, where the development of large-scale ski field and golf complexes by international corporations attracted by the relatively low costs of Canadian real estate has been facilitated by the removal of federal and provincial government restrictions on international ownership. This has led to smaller local tourist resorts and ski hills being taken over or driven out of business, unable to compete with the large capital investments of these multinational corporations (Whitson 2001). However, despite these specific cases, a growing counter-trend in participative community tourism development planning, which adopts a participative perspective in exploring the public interest, is gaining ground. These approaches center on encouraging pro-active planning, assessing not only the benefits to businesses and economic development but also the risks to community livelihood and quality-of-life, the impacts on cultural capital, and sets tourism development in the broader focus of total community development including the “no development” option (e.g., Reid et al. 2001).

The above discussion suggests that quality-of-life markers (e.g., climate, nature, facilities, employment, security, family ties, and tradition) are the key building blocks of the imagination that motivate tourists and lifestyle migrants to undertake journeys or to relocate, and which cause locals to contest developments. These powerful images or imagined worlds constructed by individuals and nurtured and amplified by electronic communication and mass media enter into the collective imagination in real places initiating and maintaining political action in defiance of those local and global forces that seek to question their authenticity and imperil their continued existence.

Discussion and Conclusion

Place and mobility are mutually defining and greatly impacted by the expansion of social interactions across the globe – interactions involving the circulation of vast volumes of people, goods, and ideas and the production and consumption of imagined worlds or places. One manifestation of this hyper-mobility is tourism in its many forms. From its beginnings in the elitist world of the “Grand Tour,” through its democratization by automobile and aircraft, and aided more recently by advances in communication technology and the World Wide Web, tourists and the tourism industry have become pervasive global forces, affecting the lifestyles and well-being of both travelers and locals in fundamental ways.

Quality-of-life in tourism is necessarily forged though the interplay of rootedness and mobility – a paradox of wanting to be rooted somewhere and nomadic at the same time. This chapter has attempted to show that people benefit from a sense of involvement, belonging, and/or identification with places they experience as tourists and as lifestyle migrants. Modern mobilities empower people to seek out meaningful ties to multiple, often distant, places as a way to anchor their identity against the otherwise disorienting forces of globalization. One manifestation of the modern task of creating and sustaining a coherent identity may well be the expansion of interest in experiential tourism as a way to “give material form to a particular narrative of self-identity” (Giddens 1991, p. 81) – adventurer, traveler, explorer, etc. – in contrast to more archetypical notions of “sun/sand/sea” mass tourism. Tourism combines notions of freedom of movement with the lure of the imagined places and experiences as vehicles for self-identification. In thinking about well-being, it is also important to recognize the needs of people to establish and maintain some control over their relationships to specific places that contribute to their sense of belonging and identity. Tourism is an important venue for building and maintaining such relationships to place. At the same time, modern life increases the burden on the individual to accomplish this identity-making task amid a seemingly endless supply of lifestyle options.

Enhancing quality-of-life and well-being through tourism development presents many challenges, none more so than fulfilling the often overly optimistic expectations of communities, tourism development advocates, and entrepreneurs. Such groups often promote tourism as an easy-entry, low-cost means of diversifying the economic base of communities and countries faced with decline in traditional industries or threats to existing livelihoods. However, as this chapter has demonstrated, it is more typically a source of varying degrees of conflict in which multiple narratives and place meanings co-mingle and collide as the process of development unfolds. Thus, future research needs to look at the processes that best ensure recognition and inclusion of this diversity, engage all citizens throughout, facilitate ongoing inclusive management of the inevitable discord, and also equitably spread the burden of costs and share the benefits arising from development. Developing such processes, which are people-centered and place-sensitive, is an ongoing challenge in enhancing resilience and hence well-being in transitional communities in both developed and developing regions in today’s complex, mobile world.

In an age where people can know and experience virtually any place on earth, future research must look at tourism through this broader lens. Tourism involves circulating through and forming relationships to multiple places, mediated by global scale social processes and networks. The world today is permeated by many images, possibilities, and sources of imagination that offer us a plethora of “better” places to be experienced and more fulfilling lifestyles to be attained. Co-creation of destination affinities and meanings by tourist and tourism promoters induces a vast range of mobilities which ultimately, in any one place, results in a complex mix of mobile people and their attendant place images superimposed on those of the “locals,” increasingly with mutually conflicting outcomes.

What this chapter has emphasized is that the combination of passing trade tourists, amenity migrants, and locals creates a unique mix of communities of interest in any one tourist place

involving potentially competing lifestyle images. Thus, Young (1999, p. 373) argues “that the success of a tourist place depends on the level of consensus on meanings negotiated between the systems of place production and consumption” – a level of consensus made more elusive by expanding lifestyle mobilities. Still, it is important to develop mechanisms to engage these multiple visions in understanding the potential impacts of proposed changes on quality-of-life. Given this complexity, a key conclusion in addressing the question of whether tourism contributes to quality-of-life is the rather unsatisfactory realization that it very much depends! What is not in doubt, however, is that imagination and mobility combine to expand lifestyle possibilities enabling more and more people to find and interact with places of their choosing that potentially allows them to pursue and construct a coherent and compelling sense of well-being.

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Chapter 13

Tourist Motivation and Quality-of-Life: In Search of the Missing Link

Graham M.S. Dann

Introduction

Separate studies of tourist motivation (Crompton 1979; Dann 1977; Gray 1970; Plog 1974) and quality-of-life (Abrams 1973; Abrams and Hall 1971; Andrews and Withey 1974, 1976; Campbell 1976, 1981; Campbell and Converse 1970, 1972; Campbell et al. 1976; Hall 1973; Hall and Perry 1974; Hall and Ring 1974; McKennell 1971; Shonfield and Shaw 1971) emerged initially during roughly the same period in the English-speaking world as other belated forms of theorizing about tourism, that is to say the 1970s (some four decades after they had taken place in Continental Europe of the 1930s) (Dann and Liebman Parrinello 2009). These Anglophone offerings were followed in turn by conceptual and empirical alternatives and/or amendments of the 1980s and 1990s (e.g., Crompton and McKay 1997; Iso-Ahola 1980; Mayo and Jarvis 1981; Moutinho 1987; Pearce 1993; Pearce and Caltabiano 1983).

However, investigations of tourist motivation and quality-of-life did not converge then and have not converged now. These discrete avenues of inquiry, thus, continue in much the same idiosyncratic and disjointed way today, albeit with a number of theoretical and methodological modifications. Indeed, over the past 40 years or so, what has so far remained elusive to scholars is the interconnection between these two realities. True, there has been research which has examined the association between the *phenomena* of *tourism* and quality-of-life, to the extent that the former is said to impact on or affect the latter (Andereck et al. 2007; Gilbert and Abdullah 2004; Moscardo 2009; Richards 1999), without actually delving into the linkages of the causal factors that underpin them. In other words, the “why” of tourism still needs to confront the “why” of well-being. Even in those otherwise worthwhile studies which have investigated the connection between incoming tourism and the quality-of-life of people residing in those corresponding host destinations (Hara and Naipaul 2008; Perdue et al. 1991, 1999; Rátz et al. 2008; Santos et al. 2007), there has sometimes been a reluctance to explore the input motivational component of the output demand (the latter comprising such additional factors as marketing, destination features, health, and wealth (Pearce 1993, p. 113)) that led to the advent of tourists in the first place. In other words, it surely needs to be acknowledged that the quality-of-life of tourists (the visitors) is often logically and temporally prior to the well-being of those inhabiting destination

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communities (the visited). For that reason alone, the microscope surely needs to focus on tourists, their motivational explanations for traveling to given destinations, and the subsequent effects which that set of experiences may have on their own subjective well-being. Bushell (2009, p. 23) captures the situation perfectly, if not comprehensively, when she states:

A sense of quality of life related to place has a critical influence on where people choose to live and work. It follows that it might be equally influential on where they choose to visit. Thus quality of life at both the shared and personal levels should be regarded as significant to tourism businesses, as an element of destination/attraction marketing and tourist motivation.

In such a manner, she links both quality-of-life and tourist motivation, albeit within the limited framework of place or space.

Relatedly, there have been demand-based inquiries that have looked into such closely affiliated quality-of-life domains as leisure (Jeffries and Dobos 1993; Lloyd and Auld 2002; Ngai 2005) and how that domain intra-correlates with other quality-of-life domains, such as health (Coleman and Iso-Ahola 1993), in addition to contributing to overall well-being (Iwasaki and Smale 1998; Ji-Sook and Patterson 2007; Wendel-Vos et al. 2004). Yet that emphasis, in turn, raises questions as to why leisure has been singled out for special treatment, when tourist motivation differs from leisure in that it is uniquely “discretionary, episodic, future oriented, dynamic, socially influenced and evolving” (Pearce 1993, p. 114). Equally and arguably such tourism-linked (Dann and Cohen 1991) factors as migration (Böröcz 1996; Hall and Williams 2002) (along with its shared components of fantasy, mobility, and displacement (Haug et al. 2007, p. 202)), as well as religion (McNamara and St George 1978; Moberg and Brusek 1978), and even ethnicity (Spiers and Walker 2009), could have been complementarily analyzed, since they too may make greater theoretical sense in leading to enhanced levels of well-being. Indeed, in relation to migration and its link with other domains, it has been argued by Haug et al. (2007, pp. 219–220) that:

If quality of life has to be understood in relation not just to home but to away, it may be that people only enjoy a supposedly high quality of life to the extent that their levels of education, employment, health and the like allow them, via tourism, to fill in those contradictions in their lives which signal lack of quality. It is through an appreciation of their own social identity at home that they can collectively recognize what is missing and what can boost their life domains elsewhere on either a temporary or more permanent basis as temporary tourists, residential tourists, or expatriates.

There have also been investigations of certain categories of tourist, e.g., seniors (Dann 2001; Milman 1998; Silverstein and Parker 2002), the disabled (Card et al. 2006; Lord and Patterson 2008), cancer patients (Hunter-Jones 2003), health carers (Mac Tavish et al. 2007), and retirees (Nimrod 2007a, b). Many of these classes of person are socially disadvantaged and, hence, may regard tourism positively either as a temporary means of alleviating their negative conditions, and/or as a basic human right (as in “Social Tourism” (Minnaert et al. 2006)), thereby also contributing to an amelioration of overall life quality. Yet such types, or even those already enjoying a reasonably elevated quality-of-life, e.g., adventure women (Lloyd and Little 2005), have not been automatically linked to tourist motivation. Neither for that matter have such favorably disposed human categories as urban dwellers (Choy and Prineas 2006) or even airline passengers (Oyewole 2002), including budget travelers (Oppermann and Cooper 1999) and frequent flyers (Long et al. 2003).

Nor does place of residence on its own constitute a necessary and sufficient condition for its denizens to seek a better life elsewhere. Indeed, and arguably, several of these points of origin have reversed their situation to the point where they have become tourism destinations in their own right already enjoying reasonable levels of life quality when compared, say, with many developing countries bereft of bare essentials for eking out a life, let alone relishing its quality. (Here the impoverished and earthquake/hurricane prone case of Haiti comes to mind). It is considerations such as these which call for a logical and temporal sequencing of direct and intermediary factors linking tourist motivation with quality-of-life. Once this theoretical exercise is complete,

the ensuing model will then require empirical testing by others. But first it is necessary to establish the autobiographical context of this presentation, as an exercise in reflexivity along with its implied declaration of personal values, before asking what is meant by the terms *tourist motivation* and *quality-of-life* or how indeed they might be directly or indirectly connected.

The Autobiographical Context

The present writer finds himself in the enviable position of having tackled both quality-of-life and tourist motivation in their initial phases of theoretical and empirical development in the English-speaking world (Dann 2007).

Quality-of-Life

In relation to the theoretical issues surrounding the quality-of-life, and as a youngish postdoctoral researcher attached to London's Social Science Research Council (SSRC) Survey Unit in the mid-1970s, under the directorship of Mark Abrams (1973), the present writer was able both to exchange many ideas with and learn from his compatriot institutional colleagues attached to the Unit (Abrams and Hall 1971; Hall 1973; Hall and Perry 1974; Hall and Ring 1974) as also from those North American researchers (particularly from the SSRC in the USA, the National Opinion Research Center (NORC) in Chicago, and York University in Ontario, Canada) either visiting or on secondment to the SSRC in the UK (cf. Shonfield and Shaw 1971). More specifically, he was persuaded by these British and American serendipitous mentors that quality-of-life was to be measured according to the subjective appraisal (McKennell 1971) by those individuals inwardly experiencing its constituent cumulative domains (e.g., education and health) rather than solely by a series of so-called "objective" indicators imposed from outside (Bramston et al. 2002; McCrea et al. 2006), like infant mortality, life expectancy, and the purity of the water supply (e.g., UNESCO 1974; for a more complete listing of these early subjective and objective approaches, see Dann (1984, pp. 5–6)). In other words, and by way of illustration, he began to appreciate that it was more relevant (and possibly of greater validity) to gauge how people perceived and evaluated their health, together with their assessment of the *quality* of care received from the medical professionals treating them, rather than examining a (reliable) checklist of symptoms and the ratio of patients to doctor per thousand of the population (*quantitative* measures so favored by politicians and other devisers of league tables for immediate, uncritical translation from statistical data to policy implementation). As one of his immediate colleagues and officemates, John Hall, summed up the subjective approach at the time, in the SSRC:

We hope to establish...a research programme devoted to the generation of information regarding the aspirations, attitudes, satisfactions, disappointments, grievances, expectations and values of the British population. For whilst objective conditions of life, in some respects have changed for the 'better' in that there is less hunger, 'better' housing, 'better' schools, 'better' transport, etc., there may not be an equivalent subjective change in feelings that life is also 'better'. People do not necessarily feel more secure or more self-fulfilled (Hall 1973, pp. 93–94).

At the methodological level, the present writer was also able to participate in the initial stages of the SSRC's utilizing path analysis (albeit with the rather clumsy inputting of data from punch cards on to a bulky mainstream computer) in order to analyze a whole range of quality-of-life related variables (Hall and Dann 1975), thanks to the earlier appearance of the first volume of the *Statistical Package for the Social Sciences* (SPSS), along with its useful chapter on multiple regression (Nie et al. 1970, 174–195).

Tourist Motivation

Just 1 year later, in 1975, after taking up a position in sociology at the smallest and youngest campus of the University of the West Indies, this author was able to apply some of his discipline's ideas to the question of tourist motivation by conducting a study of visitors to Barbados. After all, that island was, and still is, an upmarket destination for many North Americans and Europeans wishing to enjoy the tropical and exotic luxury on offer (in contrast to the tedium and humdrum routine of their cold and drab 9 a.m.–5 p.m. ordinary metropolitan lives), while at the same time being able to vaunt this new found status among their friends, family, and workmates (via “wish you were here” postcards and through the word-of-mouth “trip dropping” of names of the rich and famous celebrities who had second homes there). Indeed, it was within this framework that the key unit ideas of *anomie* and *ego enhancement* were elaborated and applied to tourist motivation (Dann 1977), concepts that had their respective sociological roots in the seminal works of Durkheim and Veblen (neither of whom specifically addressed tourism, but both of whom had theoretical insights that could be employed in its analysis). At the same time, it was emphasized that these two motivational drivers of subsequent tourist behavior had their points of origin in the anomic, status-seeking conditions facing potential tourists in their generating societies, conditions of normlessness, meaninglessness, and lack of belonging (what Wang (2000, pp. 15–19) later would describe as hatred of and escape from the dark side of modernity) that “pushed” them out of their armchairs in the home environment and on to the plane (in “no man’s land”) in search of a better life elsewhere, however temporary the alleviation.

It was only subsequently that destinations tried to match their assets to the sociopsychological states of disequilibrium (Crompton 1979) in their visitors by promoting the “pull factors” (in terms of attractions, friendly people, *joie de vivre*, sunshine, etc.) that could restore the socio psychological balance, or at least claim to do so. In such a manner, and in response to Lundberg’s (1972) initial and hitherto unanswered question, “why do tourists travel?,” it came to pass that “push” and “pull” were introduced into tourism theory (Dann 1977) to be more fully explained in a subsequent theoretical paper (Dann 1981). That this terminology has received adequate peer acknowledgment can be seen from the respective citation counts for these two papers of 316 and 366, producing longitudinally annual averages of 9.3 and 12.2 (Google Scholar 2010).

Return to Quality-of-Life

Two years later, a quality-of-life study (Dann 1984) was undertaken by the present writer in the same Caribbean island destination modeled on earlier work conducted at the SSRC in London. At the time, and even though partial studies had been carried out (sub)-continentally in India (Mukherjee 1978) and Africa (Peil 1982), the Barbados investigation claimed to be the first comprehensive inquiry of its kind to have been administered in a developing microstate. Moreover, given the levels of satisfaction recorded for six out of seven life domains on that tropical isle when compared to those earlier recorded in a study of the UK (where differences were on average less than 5% lower with the exception of religion which was 31.8% higher), as well as almost identical domain rankings (Dann 1984, p. 60), should have encouraged some academics and politicians to reflect on the shaky value of the dubious distinction between so-called developing and developed countries. After all, in Barbados, not only were the inhabitants demonstrating similar subjective levels of domain satisfaction, but also there were corresponding higher rates on a number of objective indicators. For example, in Barbados the literacy level was over 99%; there was free education from kindergarten to the award of a doctoral degree; access to both

public and private same-day health care with available, highly-trained Edinburgh consultants just one free telephone call away; solar heating and cooling; public transport running on time; abolition of taxes on dead people (inheritance tax); etc. (Potter and Dann 1987, pp. xiii–xxxiii), conditions that the UK and USA could only dream about then and fantasize over today. Thus, this tiny independent Caribbean island, not only merited its United Nations’ status as having one of the highest quality-of-life rankings among Third World territories, but could also claim to exceed comparable levels of well-being in several so-called First World countries as well.

The Conceptualization of Tourist Motivation

The earliest English-speaking attempts to capture tourist motivation were those based on structural binaries. Here one thinks of Gray’s “one-dimensional” (Pearce 1993, p. 120) distinction (1970) between “wanderlust” and “sunlust,” Plog’s (1974) commercial differentiation between the psychographic types of “psychocentric” (inner-directed) and “allocentric” (outer-directed) (as respectively evident in nervous TV watching non-flyers versus adventurous, print media influenced flyers). There was also the present author’s distinction between “anomie” and “ego enhancement” in the framework of “push”/“pull” (Dann 1977) (as also Crompton’s (1979) more elaborate model within that same paradigm), and Iso-Ahola’s (1980) approach/avoidance dichotomy which led to his articulation of a four-quadrant model based on the intersection of two continua: (1) escaping the interpersonal environment and seeking interpersonal rewards and (2) escaping the personal environment and seeking personal rewards. This was a psychological model based on the intrinsic motivations of individuals.

Subsequently, schemes were proposed that were grounded on Maslow’s (1959) hierarchy of needs, which also included extrinsic motivation. According to these models, lower levels of need (physiological, safety/security, belonging) had to be typically satisfied before the higher levels (of status recognition, self-esteem, and self-actualization). In this connection, Pearce’s (1993) career ladder of tourist motivation based on inferences from tourists’ positive and negative experiences (Pearce and Caltabiano 1983) comes to mind. In ascending mode, this ladder ranged from the needs of relaxation/bodily to those of stimulation, relationship, self-esteem and development, and finally fulfillment, which had the added advantage of extending to such tourism-related needs as the management of unfamiliarity and the satisfaction of curiosity (cf. Dann 1992; Mayo and Jarvis 1981). According to this model, as tourists became older and more experienced so they tended to progress stepwise up the heavenly ladder. Here motivation was regarded, as in Dann (1981), though not in Iso-Ahola (1980), as a “hybrid” multidisciplinary concept (Pearce 1993, p. 113) relating to both the individual and the surrounding social milieu. However, there were also worthwhile attempts to link tourist motivation solely to the human environment surrounding a given person through such considerations as social class, reference groups, culture, subculture, role, and family influence (Moutinho 1987).

Furthermore, when tourist motivation was initially being conceptually elaborated (Dann 1981), seven different, though occasionally overlapping (Uysal and Hagan 1993), thematic ideas were identified—tourist motivation as a response to what was lacking yet desired in the home environment, destination pull as a response to motivational push, motivation as fantasy (Dann 1976), motivation as classified purpose, motivational typologies, motivation and its phenomenological link with varieties of tourist experience (Cohen 1979), and motivation as Symbolic Interaction’s auto-definition and meaning (Thomas and Znaniecki 1926).

From that theoretical juncture, it was just a short step to clarifying what tourist motivation was not. Here it was maintained that it was different from aspiration, verbal justification, satisfaction, reason, and intention. Even so, there were still some tourism researchers at that time (e.g., Pizam

et al. 1978) who tended to blur the distinction between satisfaction and motivation if only because they preferred to view tourism more as a tangible, consumer product rather than as a set of interrelated experiences. This writer, thus, felt it necessary to counterargue that satisfaction was a later part of the touristic process than motivation and that it was often linked to quality-of-life via the satisfaction of one or more intervening life domains (Dann 1978). Needless to say this line of reasoning evoked a spirited response from Pizam et al. (1979) in which they surprisingly asserted that pull factors did not constitute a part of motivation and that an objective was the same as a verbal justification. They also appeared to distance themselves from the domain approach to quality-of-life.

From the foregoing debate and acquired understanding, a definition of tourist motivation was then offered and explained, namely: “a meaningful state of mind which adequately disposes an actor or group of actors to travel, and which is subsequently interpreted by others as a valid explanation for such a decision” (Dann 1981, p. 205). Although this was ostensibly a sociological articulation of tourist motivation, it was nevertheless grounded in the insights of such interdisciplinary giants as Weber (1968), Thomas and Znaniecki (1926), and Schutz (1972). It was the last mentioned in particular who in addition to being a sociologist was perhaps more importantly a philosopher. It was with that background that he sought to clarify Weber’s thought by providing the key distinction between *Um-zu Motiv* (“in-order-to motivation”) and *Weil-Motiv* (“because-of motivation”), the latter sometimes being referred to as “pseudo in-order-to motivation.” (For instance, and to use a non-Shutdzian example: “why are you going to Barbados?”: “*in order to* have some fun and rum in the sun”; “why are you taking your umbrella?” “to avoid getting wet” (i.e., *because* previous experience has shown that it rains there and without an umbrella I get wet)). Schutz also supplied the complementary notion of projects cast by motivated persons into the future perfect tense who could, via the process of reflection, imaginatively construct their projected plans of action (and hence explanation in terms of reasonableness rather than logical rationality (see Pareto 1935; Dann 1981, pp. 200–201)). (Hence, to use the previous example, the subject would mentally envisage (project) herself as already in Barbados and sunbathing on the beach with an exotic drink to hand and possibly a beach-boy in attendance, and would thus be able to reflect on the situation as if it had already occurred. Moreover, since it had already happened imaginatively, the response to the why question would be relatively straightforward and memory based).

Thus, returning to Dann (1981), even though his was a predominantly sociological definition elaborated by a sociologist, it was pointed out at the same time that it was nevertheless open to different social science disciplines such as philosophy, for example, in which he was also trained. Additionally, because these disciplines had their own insights, they would thereby be contributing to a complementary and cumulative notion of tourist motivation, one that was able to incorporate both macro (structural) and micro (individual) dimensions (Jamal and Lee 2003; Wang 2000). That proviso was evidently missed by Iso-Ahola (1982, p. 257) who took the present writer to task for appropriating what for him (Iso-Ahola) was “a purely psychological concept, not a sociological one,” just as Pizam et al. had previously tried to protect their turf of marketing, even by strangely assuming that it was a social science discipline with its own body of theory. It was thus considered necessary to argue once more that tourism and hence tourist motivation were both multidisciplinary in nature (Dann 1983) and not the preserve of any one discipline (what Pearce (1993, p. 119) refers to as “owning” the concept), provided of course that the discipline in question formed part of the social sciences and was not simply a parasitic field borrowing theoretical insights from others what it lacked in itself.

It was also deemed crucial to emphasize the second half of the Dann (1981) definition relating to the interpretation of motivated action, since, unlike Iso-Ahola (1982, p. 257) who wished to remove it on the (spurious) grounds that it had “nothing to do with motivation,” the present writer contended that it most certainly needed to be retained for the very reason that it formed part of the Weberian (1968) key motivational tradition of *verstehen*—understanding—social action in

terms of behavior in its un-reified ideal typicality (and hence generalizability). Such was the rocky road of controversy in the initial period of definition formulation. Yet arguably without this useful debate, the field in those early days would not have advanced so rapidly or to the same extent. Regrettably, there seems to be less intellectual cut and thrust today, and with one or two exceptions (e.g., Jamal and Lee 2003; Steiner and Reisinger 2006; Wang 2000), correspondingly less conceptual innovation in motivational studies appears to have occurred.

Methodological Approaches to Tourist Motivation

Interestingly, only the push/pull formulation of tourist motivation seems to have survived the full rigor of empirical verification. Indeed, Uysal et al. (2008, p. 435) after reviewing a number of investigations employing either canonical correlation analysis, factor analysis, or regression analysis to the statistical testing of the push/pull paradigm in countries as diverse as Australia, China, France, Germany, Japan, Korea, Saudi Arabia, and the UK conclude: “A comprehensive review of studies on tourist motivation within the concept of the push and pull model of motivation indicates that the examination of motivations based on this model has been generally well-received and accepted.” No other tourist motivational model has been so thoroughly examined, and so far, only one modification to it has been introduced, namely, allowance for the possibility that there occasionally exists a reciprocal and *simultaneous* relationship between “push” and “pull” factors (Uysal and Jurowski 1994).

That said, however, it is still necessary to point out that, just as there can be a parting of the theoretical ways, so too can exponents be distinguished according to their methodological stance. Apart from an obvious distinction in the *modus operandi* that exists between those who apply quantitative or qualitative techniques (Dann and Phillips 2000), there is perhaps an even greater difference between *a priori* and *a posteriori* approaches to the study of tourist motivation. At the risk of oversimplification, it is maintained here that there is a significant divide between those who assemble motives from tourists according to their responses to a fixed, pre-inquiry, theoretical checklist derived deductively and top-down either from the works of other investigators or from the fertile imagination of a given researcher (*a priori*) and those who ask tourists in bottom-up, inductive fashion to provide their own motives in their own on- or post-trip terms (*a posteriori*). While the former face the occupational hazard of putting words into tourists’ mouths (thereby obtaining reliable but possibly invalid replies), the latter, taking a more grounded theory approach, often apply projective tests in order to overcome the difficulty of extracting motives from persons who are either unwilling or unable to otherwise reflect on their true situations. An example of the first, and so far more widespread, approach would be a questionnaire featuring close-ended responses to items preformulated by the researcher, while an instance of the second, less frequently adopted approach would be tourists’ interpretation of promotional pictures (iconographical images) in their own words (mental images) (e.g., Dann 1995; Jacobsen and Dann 2003). Thus, and as far as the latter is concerned, some advances do seem to have been made. That said there still has to be an appropriate way of linking tourist motivation with quality-of-life.

Quality-of-Life: New Conceptualization or a Return to Basics?

Bushell (2009, p. 29) in a recent essay identifies four factors comprising what she calls “social quality”: socioeconomic security, social inclusion, social cohesion, and social empowerment, before importantly going on to say that, “these factors link to three key domains in quality of life that resonate with tourist motivations and behaviors: being, belonging and becoming.” Prior to

this telling comment she states, “because quality of life is about the needs and hopes of individuals and groups of people—about people in their personal environments (social, cultural, and natural) as well as the global context—it is regarded as a universal ideal” (Bushell 2009, p. 23).

However, the above contemporary formulation, while conceptually rich, has the disadvantage of being difficult to operationalize. It also uses the term “domain” in a different sense from that associated with the (by now) classical treatment of quality-of-life. For those reasons, it is considered more useful to define quality-of-life as:

...The cumulative, *subjective* appraisal of *multiple* life domains (for instance, education, the family, religion and politics). As satisfaction with any of these domains increases so too does overall life satisfaction, and as it decreases life quality correspondingly declines (Dann and Berg Nordstrand 2009, p. 126, emphases in the original).

Although this equally recent definition is different from earlier ones to the extent that in its application it explicitly establishes a connection with multisensory tourism (in contrast to the ocular-centric biases of yesteryear), its basic approach is otherwise quite similar to those definitions articulated in the 1970s and 1980s which treat quality-of-life and well-being as virtually synonymous. Thus, in the Barbados investigation conducted by the present writer, for example, we find the following explanation which helps explain the terms in the foregoing Dann and Berg Nordstrand (2009) definition:

As regards quality of life research, the current study employed the domain approach, as outlined, for example, in the works of Abrams, 1973; Campbell et al., 1976; Hall and Ring, 1974; Institute for Social Research 1972 and McKennell, 1971. According to this perspective, life is, analytically at least, conducted on various levels or domains, which approximate the broad cultural institutions of economics, education, the family, law, religion, politics and leisure. From a natural standpoint individuals often manage their lives along several domains simultaneously, thus experiencing a kaleidoscope of multi-faceted events, which together comprise the overall experience of life itself. Temporally and logically, however, they can isolate domains, giving greater or lesser emphasis to one in preference to another, in accordance with their more or less stable background characteristics and changing attitudes and hierarchies of values. The reflective process of isolation enables people to speak about the relative importance and satisfaction of separate domains, together with their respective contributions to overall quality of life. This in turn permits the researcher to record and analyse these subjective indicators of well-being’ (Dann 1984, p. 35).

The single notable difference among various studies employing the domain approach, therefore, resides in their choice of domains. Here the Barbados inquiry decided to follow the domains employed in the 1971 UK investigation (Social Science Research Council 1972) which, apart from establishing the ground for a series of comparisons, was also able to provide a link with the former colonial power that had remained in unbroken control for approximately 300 years prior to Barbados’s gaining independence in 1966. The only omissions were the domains of family life, economics, and politics. The first had in any case been dropped from the UK inquiry for reasons of complex relationships that were even more problematic in Barbados; the second could be picked up via such economic variables as income and social mobility; while the third was omitted in order to avoid being interpreted as a political exercise because the survey was actually conducted in an election year (1981). Here a lesson had been learnt from the UK experience where Hall and Ring (1974, p. 2) had ironically remarked:

We picked a fantastic time to do a quality of life survey. The Arab-Israeli war had already broken out before the fieldwork started; then England was knocked out of the World Cup, Princess Anne was married, the miners went on strike, the oil crisis worsened, bringing about the three-day week, the whole followed by a General Election.

Even so, there was a better fit between the Barbados ($n=865$) and the UK study ($n=593$) in terms of wording and sample size than with the larger American investigation ($n=2,164$).

Finally, and at the risk of repetition, it should be noted that the domain approach was and still is predominantly subjective in nature. Although, for example, various objective indicators were explored in relation to the domain of “district” as utilized in the Barbados study

(e.g., the estimated distances from neighbors, school, work, doctor, church, shop, etc.), respondents were also asked to provide their subjective satisfaction scores of such complementary qualitative issues as noise, privacy, buses, community spirit, etc., before being offered the opportunity to give their similarly subjective evaluation of the overall domain of district. Thus, it was precisely in the allocation of personally assessed satisfaction ratings that the subjectivity of the exercise resided. With it being repeated for each domain, interviewees were finally asked to supply their overall quality-of-life score, not just in the present, but also in the past and future (5 years ago and 5 years hence).

Modeling the Paths to Quality-of-Life

When path modeling was employed by the SSRC in its studies of life quality in the 1970s, the principal reason for its adoption was that this relatively new statistical technique (it had been operating for just 11 years since its introduction at the University of California in Berkeley) offered normalized regression coefficients (Beta (β) values) that indicated the strength and direction of the association between interrelated variables while simultaneously taking into consideration the influence of other linked variables. In this sense, it was similar to partial correlation. Where it differed, however, was in the logical and temporal ordering of variables in a sequential model which itself had to be justified in theoretical terms. The same sort of standpoint is adopted here in justifying the paths linking tourist motivation (along with antecedent and subsequent variables) to quality-of-life. This operation is performed at the theoretical level in stages. It should be emphasized that the assignment of variables to stages is open to discussion and hence alteration, but it is necessary to have some scheme in place so that it can be accepted, rejected, or altered in the light of theoretical debate and empirical verification. The model, with a few modifications, is a simplified version of that found in Dann (1984, p. 200) and is provided here mainly for illustrative purposes. A more sophisticated version can be generated and applied by interested others. For example, those wishing to include the variable social class (e.g., Palomar-Lever 2007) may, like the present writer, wish to construct a composite variable containing such weighted factors as social mobility (including increase or decrease in real income and change of residence to better or worse areas), occupation, home ownership, and education, as indeed was carried out in the original Barbados study (Dann 1984, p. 267).

Stage One: Basic Profile Variables

These variables comprise those which are involuntarily determined at birth, such as age and sex. (Race, too, could be included here). Whereas today there are occasional surgical attempts by individuals to alter these characteristics, for most researchers, they are taken as unchanging profile variables. Furthermore, and although forming part of a path model, they are rarely found to be directly associated with quality-of-life. However, they can and do have indirect paths to life quality via intervening variables. It should also be noted that these variables, while typically reinforcing individual identity, also have a sociocultural dimension that is activated via role. There are thus varying cultural expectations that are associated with sex (known in this context as “gender”) and age (cohort behavior). (The equivalent for race would be ethnicity). In such a manner, investigations into well-being can mirror those exploring motivation to the extent that they encompass both a micro and macro dimension, as recommended by Jamal and Lee (2003).

Stage Two: Second Level Variables

These variables might include health, marital status, and education, for instance. (Area of residence could also be inserted here, although its explanatory power would need to be linked to the rather complex opportunities for social mobility). As with basic profile variables, second level variables typically have no direct paths to quality-of-life, but are associated with it indirectly. These also have sociocultural dimensions that are mediated by roles.

Stage Three: Third Level Variables

The main level three variables are those of income and occupation which again are not usually associated directly with life quality but can lead to it via domains of life satisfaction. Again there are expectations associated with affluence and lack of wealth just as there are with work and the workplace. At the social level, class and reference groups could also be included at stage three.

Interassociation of Stages 1 to 3

At this juncture, it is worth noting likely paths linking the basic variables in the first three stages. Starting with stage one, since age and sex have no variables to their left in a left-to-right model, they are hypothesized as having no antecedent variables. Nor for that matter are they likely to have an intra-dependent relationship (within the same stage), except possibly for the skewing of the sex ratio in the age cohorts of some societies. However, age and sex can and do affect higher level variables. In this instance, age is likely to be negatively associated with health and education and positively linked with marital status. That is to say, as people grow older so they are likely to register inversely elevated scores on a health index ranging initially from admitted long and short-term physiological conditions (and psychological worry about them) to a stated absence of all three health factors. Similarly, older persons are far more likely than younger persons to be in a marital or other permanent relationship. By contrast, younger generations are more likely to avail themselves of greater opportunities of higher levels of education than their senior counterparts. Sex, on the other hand, is likely to display a small negative association with health (i.e., there is a slightly greater probability that women will admit to more health problems than men and hence to seek medical advice), though not likely to be associated with other level two variables.

Turning to stage three variables and looking for direct paths from stage one variables, age and income will probably display a weak positive association, to the extent that younger individuals are more likely to earn less than their elders. Sex by contrast is likely to highlight an inverse relationship between males and females to the degree that the former will almost certainly have higher incomes than the latter, even for the same type and duration of work. The actual occupation itself will probably, though to a lesser extent than income, tend to favor men, higher categories being more available to them than to women.

Examining the probable linkages between stages two and three, while healthy individuals are more likely to earn more than their less healthy counterparts, there may be no direct association with occupation. Whereas marital status may be marginally linked to income but not associated with occupation, education will probably have a very strong relationship with both variables, the better educated recording significantly higher levels for each.

Finally and to complete the picture, it will be necessary to look for instances of same level associations. In the present example, there are unlikely to be any, except possibly a link between occupation and income. The word “possibly” is inserted with some justification because, for the average worker, the asymmetry between pay and type of work, as well as compensatory anomalies and cancellation effects, may reduce the probability of a positive association between the two variables. Absence of intra-association, however, actually helps the path model to the extent that the various levels can be more easily justified.

By way of summary, so far the following simplified path model emerges:

Stage 4: Domain Satisfaction

Once a simplified model for the background or profile variables is in place, it is then possible to introduce quality-of-life domains, an approach initiated in the 1970s and still continuing today. The advantage of such a method is that it is handled subjectively according to the satisfaction estimated by the subjects of the investigation which, in turn, leads to overall life satisfaction or quality-of-life at the next stage (5). Of course it is up to a given researcher to decide which domains to employ. In this regard, the present writer selected domains for his Barbados study which had previously been found by his UK colleagues at SSRC to be both theoretically worthwhile and empirically justified (Hall 1973; Hall and Perry 1974). The domains covered the areas of work, district/neighborhood, housing, health, education, spiritual well-being (religion), and leisure, and levels of satisfaction for each had positive paths to life satisfaction (the measure for overall quality-of-life). Given that none of the previously discussed profile variables had direct links to quality-of-life, the point in introducing the domains here was to see whether any of the profile variables had associations with them, and hence indirect paths to overall life quality. In the event, six out of the seven domains had links with prior variables, all except the domain of leisure. That surprising finding in itself should give pause for thought since (as previously noted) there may be ways other than leisure in considering tourism and hence tourist motivation.

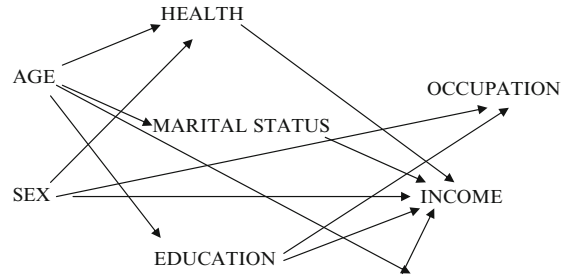
Interestingly, in the Barbados study, spiritual well-being had three linkages with prior variables. It was positively associated with age (stage 1) and negatively associated with education (stage 2) and income (stage 3). That means that not only did older persons tend to register higher levels of domain satisfaction in relation to spiritual well-being, but also the less well-educated and less affluent were associated to a greater degree with the higher subjective evaluation of spiritual well-being. If we bear in mind that spiritual well-being, like every other domain had a direct and positive path to overall life satisfaction, then the above directions also obtain for the indirect paths.

Health was another domain which had three linkages with lower level variables. Due to the way that the variable was coded, a negative association with age (stage 1) signified that younger persons experienced greater health satisfaction, healthier persons attained higher health satisfaction scores (stage 2) as did those in more permanent consensual relationships (stage 2). The last finding is interesting, given the degree of multicollinearity between age and marital status, but the result still stands with the realization that paths already take interassociation into account.

Work satisfaction was a domain that had two direct and positive linkages to prior variables. Unsurprisingly both were from stage 3—income and occupation itself. For the indirect associations, it is necessary to refer to Fig. 13.1 and to multiply the values of the paths obtained from a given piece of research. In the Barbados study, income had paths from age, sex, education, marital status, and health, while occupation was linked with sex and education.

The remaining three domains had only one previous association. Here the education satisfaction domain was naturally enough linked directly with education itself (greater educational

Fig. 13.1 Simplified path model of profile variables



opportunities being associated with higher satisfaction scores). Occupation was similarly positively associated with housing satisfaction, and district (or neighborhood) satisfaction was also positively associated with a prior variable, in this instance marital status, that is to say, those in more permanent relationships also tended to display higher levels of satisfaction with the area in which they lived.

Stage 5: Life Satisfaction

Finally, it is worth noting that life satisfaction or overall quality-of-life is very much predicated on the domains themselves. All will typically have direct and positive paths from individual domains to cumulative well-being. In the Barbados study, in declining magnitude, the quantum of the associations was ranked from education to spiritual well-being, leisure, housing, work, district, and health. Indirect paths via antecedent variables and domains were established from prior stages.

Inserting Tourist Motivation into Quality-of-Life Path Models

In order to establish the missing link connecting tourist motivation with quality-of-life, there would appear to be at least four possible models. Where to insert tourist motivation is thus reduced here to a choice from among the following alternatives.

The first model argues that measures of tourist satisfaction (either as a subset of leisure or independent of leisure) are in turn conducive to overall quality-of-life (Neal et al. 2004). In this model, tourist satisfaction would appear immediately prior to life satisfaction and just after domain satisfaction, i.e., between stages 4 and 5. However, tourist motivation would in all likelihood need to be inserted at this intermediary stage (4a) or at an even lower stage, possibly 3. The reason why in this model motivation *precedes* satisfaction is that it is logically and temporally prior to it. Alternatively stated, tourist motivation is a subset of tourist demand (Pearce 1993, p. 113), and tourist demand is antecedent to actual travel and its satisfaction. Hence, there is a need to insert tourist motivation *before* any experience of tourism. Without tourist motivation, there is no adequate explanation for tourism or its relationship to well-being.

The second model maintains that those already with currently high levels of life quality seek to *consolidate* their fortunate situation with subsequent tourist experiences that have the

effect of increasing their overall life satisfaction even further. In this iterative scenario, tourist motivation and tourist experiences would typically both appear *after* level 5. Once the association with religion is inserted, this would mean that higher levels of spiritual well-being satisfaction among those with lower incomes and lower levels of education, but of greater age, would be similarly experiencing greater life quality and thus open to the hypothesis of consolidation. Such was the reasoning in another study conducted by the present writer behind the appreciation of cold water islands by reasonably affluent, antimaterialist tourists carrying with them, and as a matter of choice just the bare essentials, when contrasted with those seeking material pleasure in tropical climes as a golden opportunity to parade their wealth in their designer wear and luggage labels bearing the names of the five star hotels which they had patronized (Dann 2006).

A third model comprises those persons who are disposed to tourism as a form of *compensation* resulting from the relatively low levels of life quality experienced by themselves in their home societies (Krippendorff 1987). This latter chain of causality follows that of model two, i.e., in its contention that overall life satisfaction is the independent variable that leads to tourist motivation and hence to tourism. Where it differs, however, is in its assertion that alienation is what is conducive to tourism.

Fourthly, it can be argued that tourist motivation is an intervening variable that is conducive to quality-of-life, either in its own right (and at a lower stage still to be identified), or as part of another domain (e.g., leisure or spiritual well-being) or even as an identified factor, like migration, that is yet to be incorporated into the model (see earlier). Whatever is the case, whether it is to be treated as occurring at the same stage as the other life domains or somewhere else in the model is open to theoretical justification and empirical verification. Indeed, it is precisely the lack of systematic and cumulative research in this respect that makes it so challenging an area for future investigation.

An Outstanding Obstacle: The Concept of Satisfaction

Throughout this account, reference has been made to quality-of-life as a composite measure of satisfaction which, in turn, is based on the satisfaction of various life domains. Furthermore, this satisfaction is regarded as a subjective appraisal of both domains and overall life quality. However, a problem occurs if tourist motivation is regarded or treated in the same way, i.e., as the graded satisfaction of anticipated experiences, a sort of “servqual” exercise in which various components of a vacation (hotel, travel, sightseeing, excursions, etc.) are scored as meeting or failing to meet prior expectations. If this were the case, then tourist motivation (pre-trip) would simply be the same as tourist satisfaction (on-trip or post-trip) and the temporal sequencing so necessary for path analysis would be placed in jeopardy. Even more crucially, however, it would erode the distinction between motives as the conceptual *origin* of potential behavior long before the actual *realization* of that conduct. For this reason, it is important that care is taken over articulating the concept of need satisfaction in motivational terms. In any case, the whole idea of having a list of needs, whether or not based on a hierarchy or ladder, that requires checking off in ascending order strikes this writer as being overly mechanistic and functional. Additionally, it tends to privilege the individual at the expense of the surrounding structural level (Jamal & Lee) when optimally both components should be taken into account so that a complete explanation (and hence understanding) can be achieved.

Conclusion: Prospects for the Future

Some time ago, Crick (1995, p. 218) expressed the view that “despite the great increase in social science tourism research over the last 20 years, we are still very much in the dark about tourist motivation.” Paralleling this sentiment, Bruner (1995, 225) maintained that:

We have generalizations in the literature about tourist motivations, that they are on a sacred journey (Graburn 1977), that they are on a quest for the authentic self (MacCannell 1976) or that tourism is play (Cohen 1984), but little systematic observation on the tourists' own reactions and interpretations.

Apart from the fact that the foregoing “generalizations” are more correctly described as theories or paradigms rather than as motivations, the writer of this chapter does not entirely share these rather overpessimistic positions, even though he appreciates their underlying point, namely, that for advances to be made in this subjective realm of motivation, tourists' themselves, rather than the researcher, must be given greater voice. Indeed, he has already argued that the *ipsissima verba* (the very words) of tourists constitute their bottom-up subjective appraisal or participant theory as elaborated by themselves, rather than as an objective top-down instance of applying some preformulated theory to their particular cases. Indeed, it is this intra-subjective world of definitions of situations and projected actions that provides the missing link between motivation and a quality-of-life that is similarly couched and evaluated in personally meaningful terms. Alternatively stated, if quality-of-life is precisely that, a qualitative phenomenon to be comprehended qualitatively, it surely follows that tourist motivation which is associated with it should be similarly treated.

For this reason in the years ahead, one should expect to see greater emphasis on qualitative *a posteriori* research. Already a commendable start has been made by scholars such as Pearce and Caltabiano (1983) who base their findings on tourist experiences along with their inferred motivational components. Such a position is also evident in the work of McCabe (2000, 2002) and McCabe and Stokoe (2004) who apply a rarely utilized ethnomethodological approach to tourism as a facet of everyday life (and hence quality-of-life). Here, once again the stress is on how individual “members” of a given society make sense of and communicate about their situations, along with their different accounting procedures and various assumptions. It is thus in making experiences accountable that motivation is revealed. Rendering latent tourist motivation manifest is also evident in those projective techniques that employ the visual stimulus of photography (as an analog of sightseeing) in order to elicit deeper feelings that can best be described in motivational terms (Dann 1995; Jacobsen and Dann 2003). Similarly motivation can be inferred from electronic forms of communication. Here one thinks in particular of travel blogs (Dann and Liebman Parrinello 2007), as also reactions to the narrated experiences of others on travel sites and in the various discussion forums of guidebooks such as *Lonely Planet* and *Rough Guide*. All these online sources represent a veritable mine of information from which motivations can be deduced at little or no cost to the researcher. While there have not been that many studies that have analyzed this freely available material, in the years ahead, attention will almost certainly and increasingly focus on it.

Even so, it should also be noted that statistical techniques, such as content analysis, can and should be applied to tourist motivation before the analysis necessarily takes the foregoing semi-otic turn in terms of grasping the layered meaning. That is to say, all the subjectively formulated descriptions need to be systematically ordered and categorized before they are interpreted, a fundamental point made by one of the founding fathers of sociology, Émile Durkheim (1895), in his classical work on methodology. A good example of this dichotomous approach in a contemporary study is Mehmetoglu's (2003) dissertation on backpackers in the Norwegian Lofoten islands, and the subsequent justification of applying a useful computer program, such as “ATLAS.ti,” to the generated qualitative data (Mehmetoglu and Dann 2003). Similarly the application of path analysis to the subjective appraisal of life domains can also be justified.

All this is another way of saying that the establishment of the missing link between tourist motivation and quality-of-life depends on a suitable combination of quantitative and qualitative approaches, thereby finally destroying the myth that the two realms are necessarily antagonistic or mutually exclusive. If that is a case of having the best of two methodological worlds, then so be it.

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Chapter 14

Understanding the Antecedents of Destination Identification: Linkage Between Perceived Quality-of-Life, Self-Congruity, and Destination Identification

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Introduction

Social identity theory discussing the identities arises from social membership focuses on identification concept. Identification, defined as “the perception of oneness or belongingness to some human aggregate” (Ashforth and Mael 1989: 21), has received attention from different academic disciplines. Its special form in organizational behavior literature as organizational identification and in marketing literature customer–company identification and brand identification derived from social identity theory are interesting research areas. The social identity theory focusing on identifications gives new insights to the consumer behavior literature. This study discusses destination identification as a new concept for tourism. People and their relations with places is a major concern, for environmental psychologists state that place identification is similar to group identification and a powerful source of social identity (Ng et al. 2005). This study uses destination identification like brand identification in the line of marketing literature.

According to the purpose of the study, a model is proposed in order to understand the antecedents of destination identification. In the model, there are four major concepts – perceived quality-of-life (QOL), self-congruity, tourist satisfaction, and destination identification. The first relation discussed is between destination identification and QOL. In tourism literature, QOL has a special place. Different academic disciplines have examined tourism and its impacts on various aspects like economics, psychology, sociology, and anthropology in the literature. But there is one aspect of tourism that should not be ignored: the people. So the social impacts of tourism have generated a special interest from academicians (Gjerald 2005).

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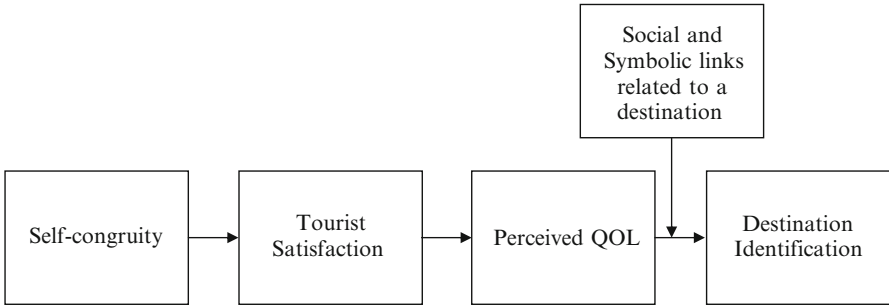


Fig. 14.1 The proposed model

The social impacts of tourism make it central to the studies related with QOL. QOL is a difficult multidimensional and interactive concept to define, as it is a subjective experience dependent on individuals’ perceptions and feelings about their lives and environments. In short, QOL refers to individuals’ satisfaction with life and feelings or fulfillment with their experience in the world. It is a subjective construct, as similar situations and circumstances may be perceived differently by different people (Andereck et al. 2007).

This difficulty of definition put apart, it is believed that there is a relation between the “quality-of-life” of the consumer and the concept of satisfaction with consumption as an everyday experience of people. In this literature, tourism consumption has generated a special interest, as leisure activities or tourism in general is a major life domain that generates life satisfaction. These distinct literatures on QOL and destination identification derived from social identity theory make it possible to link these concepts. After this discussion, according to the predictors of identification that put forth the importance of social and symbolic links to a place with the importance of self-relevant needs of individuals, this concept is introduced as the moderating variable in the relationship between perceived QOL and destination identification.

Social identity theory and identification concept and its relation with self-congruity theory are discussed under the following topic. According to the purpose of the study, self-congruity in consumer behavior and tourism literature is examined and possible relation of this concept with destination identification, tourist satisfaction, and QOL is discussed. In this manner, current study discusses and integrates these theories and proposes a preliminary conceptual model with propositions underlying these theoretical bases. Figure 14.1 illustrates the proposed direct and indirect relationships between the concepts with theoretical bases.

Social Identity Theory and Identification

Social identity theory focuses on in-group relations, group processes, and its relation with self-concept (Hogg et al. 1995). Social identity is defined as “the part of an individual’s self-concept which derives from his knowledge of his membership of a social group together with the value and emotional significance attached to that membership” (Tajfel 1982: 24). Social identity theory put forth that the identities forming the self-concept arise from the social memberships (Baron et al. 2005). In other words, the answer to the question “who am I” comes from social groups and entitled social identities (Kağıtçıbaşı 1999).

The theory discussing that individuals are intent to have the sense of belonging focuses on memberships derived from identifications that form the individual and social identities forming their self-concept. In this line, identification is the main subject of social identity theory and

defined as “the perception of oneness or belongingness to some human aggregate” (Ashforth and Mael 1989: 21). Social identification, widely used in social psychology, studying group behavior and examining the individual’s sense of belonging, has been applied to other academic disciplines. Especially in organizational studies, organizational identification as a special type of social identification has been studied (Ashforth and Mael 1989; Mael and Ashforth 1992; Ashforth et al. 2008). Through social identification, individuals perceive themselves as psychologically intertwined with the fate of the group, as sharing a common destiny, and experiencing its successes and failures (Ashforth and Mael 1989). This strong emotional bond with organizations put forth the importance of the concept as identification has consequences like increased turnover intention, satisfaction, and organizational citizenship behavior (Ashforth et al. 2008).

In marketing literature, the concept of identification has been studied from two perspectives. Within the line of organizational identification derived from social identity theory, organizational identification research suggests that individuals seek out organizations for identification purposes even when they are not formal organizational members. This assumption forms the first stream of research in marketing literature as consumer–company identification. Bhattacharya and Sen (2003) say that the notion of consumer–company identifications conceptually distinct from consumers’ identification with a company’s brands, its target markets, or, more specifically, its prototypical consumer as a brand’s identity is often distinct from that of the company’s (Bhattacharya and Sen 2003). The second concept is brand identification which is an interesting research area that generated little attention (Aaker 1997; Kim et al. 2001). So, identification derived from social identity theory has generated an interest from other academic disciplines as the concept has positive outcomes on individuals’ behavior. In marketing literature, there are few attempts trying to understand if this construct also shows that identification is a predictor of brand loyalty and word of mouth. According to the findings of a study, there is an indirect relationship between brand identification and brand loyalty with the mediating effect of word of mouth (Kim et al. 2001). This importance of identification put forth another significant question as “how will identification occur?” or in other words, “what are the antecedents of identification?” The marketing literature discussing the relationship between attractiveness of brand personality and identification (Kim et al. 2001) and organizational identity and its attractiveness as the antecedents of identification (Bhattacharya et al. 1995) shows that the theory is in its infancy. This study first introduces QOL as an antecedent of identification.

The Linkage Between Quality-of-Life (QOL) and Destination Identification

Different academic disciplines have examined places as a subject of identification. In this manner, place belonging and place attachment studies in environmental psychology can give insights to tourism studies. These studies focus on identification of the residents; this study tries to understand destination identification of the tourists.

In environmental psychology, human–environment relations are examined, and with relation to place, there are numerous concepts like place attachment, place identity, place dependence, and place belonging. Jorgensen and Stedman (2006) use “sense of place” as an umbrella term in their study. All these concepts are similar or related terms; for example, “place belonging” is defined as (Ng et al. 2005: 347) “a sense of belonging to a particular place as if it were one’s own home” that resembles identification definition. The concept is territory-based and can be distinguished from belonging to a social group based on ethnicity, gender religion, and so forth. But Ng et al. (2005) state that withstanding this difference in referential meaning, place belonging is similar to group belonging in terms of the comfort and sense of security that they both bring.

And also, place belonging is a powerful source of social identity and pride that contribute greatly to the sense of self and self-definitions as group belonging in social psychology. Environmental psychology have shown that place belonging is a source of identity as one's group membership (Ng et al. 2005; Cuba and Hummon 1993). Within the line of these explanations, in this study, destination identification is seen as brand identification. This study with the aim of discussing the possible antecedents of destination identification proposes a model with the first predictor of quality-of-life, so in order to understand the possible predictors of destination identification, QOL literature will be briefly summarized first.

Much research focuses on consumption and quality-of-life, as consumption has a central place in people's everyday life, influencing their quality-of-life. In quality-of-life studies, tourism has generated a special interest besides the importance of tourism and its effect on societies' QOL from a macro perspective; within the micro perspective, influence of tourism on individuals' life is seen as a determinant of QOL.

Tourism consumption and especially engaging in leisure activities and QOL of tourists is the main subject of related studies. In these studies, elderly people (Dann 1999) and retirees (Nimrod 2007; Nimrod et al. 2009) engaging in leisure activities have generated a special interest. In this context, a study shows that social support from families or friends to increase leisure and health-related activities enhance older people's QOL (Sasidharan et al. 2006). Elderly people participating in these activities perceive enhancement in their QOL by identified positive emotional effects relating to their sense of belonging to a group and to their ability to remain physically active (Schwartz and Campagna 2008). Wei and Milman (2002) study also shows that on vacations, participating in activities is positively related with senior's psychological well-being. Health and well-being is also discussed by health benefit consequences of holiday taking for people with health problems (Hunter-Jones 2003).

Definitions obviously state that overall life satisfaction or subjective well-being results in improved perceived QOL. And life satisfaction is a consequence of major life domains. Neal et al.'s (2004) model tries to find out the effect of tourism services on travelers' QOL. The model suggests that overall life satisfaction is derived from two sources of satisfaction, satisfaction with nonleisure life domains and satisfaction with leisure life. Satisfaction with leisure life is derived from satisfaction with leisure experiences that take place at home and satisfaction with travel/tourism experiences. So, leisure activities are one of the major life domains, and perceived QOL or overall life satisfaction is a consequence of satisfaction with major life domains, including leisure activities (Neal et al. 2004). So, leisure satisfaction and QOL linkage (Ngai 2005; Lloyd and Auld 2002) seem to attract the researchers.

Within this line, Oyewole (2002) discusses and empirically tests the effects of the mood and quality-of-life of respondents on the level of satisfaction with services in the airline industry. The study findings support these relationships. This study's design is different from other studies trying to find the impact of satisfaction with consumption on the quality-of-life of consumers. But at the end of the study, the recommendation is for the management of airlines improvement of quality-of-life of the consumers in their marketing communications to make them more satisfied consumers. So this study and findings make readers think that satisfaction with leisure activities and satisfaction with life in general or quality-of-life linkage has to be viewed from two perspectives, as QOL is a consequence or antecedent of consumer satisfaction. In another study, Gilbert and Abdullah (2004) empirically test the relationship between holiday taking as a leisure activity and experience of life satisfaction or subjective well-being. The study shows that holiday taking has a positive impact on life satisfaction, as holiday takers experienced a higher amount of pleasant feelings after their holidays – being satisfied, generating positive moods, and enhancing an individual's sense of well-being. The positive emotions gained from leisure activities, holiday taking, or, in general, tourism consumption contribute a sense of well-being or gained perceived QOL.

The abovementioned literature discusses the importance of tourism consumption on quality-of-life. And these studies obviously show that satisfaction with tourism consumption and QOL are related concepts. The underlying reason of the linkage between leisure activities and life satisfaction or QOL is the meaning-making through leisure (Iwasaki 2007). Within the line of Iwasaki's (2007) study, aspects that can facilitate meaning-making and life-quality-enhancement include four parts: positive emotions and well-being experienced from leisure, positive identities and self-esteem gained from leisure, social and cultural connections and a harmony developed through leisure, and leisure's contribution to learning and human development across the lifespan. The enhancement of QOL through tourism consumption and the abovementioned meaning-making through leisure make the basic thought of the linkage between perceived QOL and destination identification; as previously discussed, destination identification is a strong emotional bond with a place. The following proposition is formed to express the effect of QOL on destination identification:

Proposition 1: Perceived QOL positively effects destination identification.

This study integrates identification theory into tourism context as destination identification. But places have a special topic for environmental psychologists, so place identification is seen as a central construct for environmental psychologists. A recent study integrates psychological and anthropological literatures in order to understand the predictors of place identification (Droseltis and Vignoles 2010). Droseltis and Vignoles (2010) says that one group of predictors comes from the social anthropological literature on place identity. According to these theoretical bases individuals and communities may be linked socially and/or symbolically by six ways to places. These are genealogical links like links to family, places of origin; loss or destruction of community like places that were lost due to migration or catastrophes; economic linkage like owning property or workspaces; cosmological links through religious, spiritual or mythological relationship; pilgrimage and celebratory cultural events; and last narrative link through storytelling and place naming. This view makes meanings attached to a destination as another predictor of identification. In fact, as it is discussed before, the underlying reason of the linkage between leisure activities and life satisfaction or QOL is the meaning-making through leisure (Iwasaki 2007). So the satisfaction leading to enhanced perceived QOL with social and symbolic links mentioned by Droseltis and Vignoles (2010) will increase the level of place identification of the tourists. In this study, it is proposed that perceived QOL impacts destination identification. And also, it is thought that the symbolic or social links associated with that destination will moderate this relationship, in other words, strengthen this relationship. The following proposition expresses this relationship:

Proposition 2: Social and symbolic links associated with a destination will moderate the relationship between perceived QOL and destination identification.

The Direct Effect of Self-Congruity on Destination Identification

In the consumer behavior literature, Levy's (1959) study is the first suggesting that consumers do not buy products only for their functionality but for their meanings associated with symbols. The symbolic nature of consumption and its linkage with self-concept that has a determining role on individual's behavior have been studied empirically over the past five decades. Self-concept that is defined as "the totality of the individual's thoughts and feelings with reference to the self as an object" (Rosenberg 1989: 34) is an interesting research topic that generated considerable attention in consumer behavior literature. In studies related with self-concept, "self-congruity"

which refers to the match between consumers' self-concept and the image of a given product is one of the most interesting research areas. "Self-congruity theory" is based on the assumption that consumers prefer products that have similar images with their self-image. The theory discussing the purpose and motives of consumption with relation to self-concept in detail is conceptualized on the bases of discussion started in the 1960s about the relationship between consumption and self-concept. In this context, the motives guiding the consumer behavior are the need for self-esteem and self-consistency (Sirgy 1982; Sirgy et al. 1991).

These studies show that consumer behavior is affected by their self-concept, indicating that consumers have more favorable attitudes and more likely to consume products that have images consistent with their self-concept (Belk 1988; Graeff 1997; Grubb and Grathwohl 1967; Grubb and Hubb 1968; Landon 1974; Lee 1990; Munson and Spivey 1980; Onkvisit and Shaw 1987; Sirgy 1982; Sirgy and Danes 1982; Solomon 1983). However, the conceptualization of self-concept in the consumer behavior literature is confusing as there are numerous definitions and conceptualizations of self-concept in the psychology literature (Sirgy and Su 2000). The reason is the variety of paradigms with different assumptions in psychology about self-concept (Reed 2002); as Markus and Nurius (1986) define self-concept as an integrated system of self-schemas, the recent self-concept literature views self-concept from a multidimensional perspective (Sirgy and Su 2000). In the light of this perspective, there are four aspects of self-concept usually used to explain consumer behavior. These are the actual self, ideal self, social self, and ideal social self-concept (Sirgy and Su 2000). The actual self and ideal self are the most empirically tested dimensions (Dolich 1969; Landon 1974; Delozier and Tillman 1972).

Much of the research in self-congruity in consumer behavior literature has predicted the impact of the concept on preconsumption behavior of consumers like product preference, brand preference, brand choice, and purchase intention (Dolich 1969; Hughess and Guerrero 1971; Landon 1974; Belch 1977; Sirgy 1979; Sirgy and Danes 1982; Eriksen and Sirgy 1992; Eriksen 1996; Mehta 1999; Graeff 1997; Hogg et al. 1999; Litvin and Kar 2002). Self-congruity effect on postconsumption behavior like consumer satisfaction and brand loyalty has generated little attention. These studies focusing on postconsumption behavior have predicted that self-congruity has a positive direct effect on consumer satisfaction and brand loyalty. (Sirgy and Samli 1985; Kressmann et al. 2006; Armutlu and Üner 2009).

The literature addressing travel behavior discusses many factors as determinants of tourist behavior. One of the factors and an interesting research topic in tourism literature is destination image. Although in the tourism literature destination image has received considerable attention, there are relatively few studies on self-image and destination image congruity and its effects on tourist behavior.

Chon and Olsen (1991) and Chon's (1992) studies are the pioneering works which have successfully applied the self-congruity theory to tourism. According to these studies, tourist satisfaction is significantly correlated with actual and ideal self-image and the destination's user image. And also, other studies on tourism mostly predict the relationship between self-congruity and tourist satisfaction (Litvin and Kar 2002; Ekinci and Riley 2003; Back 2005). In tourism literature related with self-congruity, Sirgy and Su (2000) described an integrative model of destination image, self-congruity, and travel behavior. According to their integrative model, travel behavior is proposed to be influenced significantly by both self-congruity and functional congruity. The basic proposition is that travel behavior is affected by self-congruity. And there are moderating variables that affect this relationship like experience, knowledge, and involvement. A recent study empirically tested the relationship between self-congruity and destination choice and the moderating effect of experience and involvement in this relationship. According to the results of this study, the basic relationship between self-congruity and travel behavior is supported and the moderating variables are discussed (Beerli et al. 2007). This study is about destination choice, but previous studies have mostly predicted the effect of self-congruity on

satisfaction, as mentioned before. So it can be concluded that self-congruity impacts pre- and postconsumption of tourist behavior.

Identification studies in marketing literature as brand identification and consumer–company identification stresses the determining role of perceived similarities like identity attractiveness and similarities between the brand or company and the consumer (Bhattacharya and Sen 2003). On the other hand, in social identity theory, discussion about identification begins with the individual's motive as self-enhancement and self-consistency. These two motives give the answer to the question “why do individuals identify.” These self-related motives are the basic human desire to expand the self-concept (Ashforth et al. 2008). Social identification theory asserts that organizational images are systematically linked to members' self-concepts and maintain the organizational membership; a perceived organizational identity or the attractiveness of the image that depends on the extent to which it enables self-consistency and self-enhancement influences the level of identification of a member (Bhattacharya et al. 1995). As previously discussed, these are the main motives underlying the self-congruity theory.

This theoretical base makes the thought of self-congruity and identification related concepts. And also, the concept of “extended self” by Belk (1988) makes this link meaningful, as the extended self refers to a strong emotional bond with the possessions and using these possessions in defining the self-concept like individual and social identities. So extended self is different from match between product image and self-image, but it is a consequence of perceived similarity suggesting that a strong emotional bond with the product makes the product an extension of self. And also, a recent study states that one of the predictors of place identification is individual motives and needs derived from identity theory that put forth the importance of self-esteem and continuity motives as the predictors of identification with a place (Droseltis and Vignoles 2010). This discussion is within the line of this chapter's point of view, as discussed above on previous topics, and signifies the relationship of identification with self-concept.

This study proposes self-congruity as an antecedent of identification. In other words, it is thought that the consumers perceive that congruity between product images and self-images will be more identified with that product or brand. The following proposition expresses this direct link between self-congruity and destination identification:

Proposition 3: Self-congruity positively effects destination identification.

The Indirect Effect of Self-Congruity on Destination Identification with the Mediating Role of QOL and Satisfaction

Self-congruity studies in tourism show that the concept is directly related with satisfaction with positive impacts on tourist satisfaction. In other words, destination image and self-image congruity, which refer to self-congruity in short, in tourism studies indicates that the concept has a positive impact on satisfaction. On the other hand, the literature addressing the QOL and tourism obviously states the linkage with tourism consumption and enhanced QOL stressing the influence of satisfaction mostly with leisure activities. So if self-congruity impacts satisfaction positively and satisfaction with tourism consumption affects QOL, the linkage between self-congruity and QOL can be viewed from a different perspective as the influence of self-congruity on QOL, as a direct and an indirect effect. The studies focusing on the antecedents of QOL stress the importance of tourist satisfaction. But it is interesting that while there is a great deal of effort in determining the antecedents of satisfaction in consumer behavior, there are little attempts trying to link QOL with other variables influencing satisfaction. There is only one study empirically testing the effect of self-image congruency on QOL (Grzeskowiak and Sirgy 2007). The study, guided by the

perceived QOL impact model, defines the concept “consumer well-being (CWB)” as consumer’s perception of the extent to which a brand (a consumer good or service) contributes to positive effect in various life domains creating an overall perception of the quality-of-life impact of that brand. Findings of the study for coffee-shop consumers did not support the direct effect of the self-congruity on CWB. However, this relationship still needs a further examination with different mediating variables. This study proposes that self-congruity effects QOL through satisfaction with tourism consumption. To express this relationship, the following propositions have been formulated:

Proposition 4: Self-image congruence positively effects tourist satisfaction.

Proposition 5: Self-congruity has an indirect effect on perceived QOL. Tourist satisfaction mediates the relationship between self-congruity and perceived QOL.

The concepts and their relation discussed above state that the concepts follow a sequence. Self-congruity is the determinant of satisfaction, and satisfaction is the determinant of perceived QOL. In other words, the antecedents of QOL are self-congruity and satisfaction with tourism consumption. As previously discussed, perceived QOL and destination identification are related concepts. Within the line of the proposed model, one of the predictors of destination identification is perceived QOL. This study, discussing the antecedents of destination identification, put forth the direct and indirect link between self-congruity, and destination identification proposes the mediating role of QOL in this relationship, so the final proposition is the mediating role of QOL. The following proposition expresses this relationship:

Proposition 6: Self-congruity has an indirect effect on destination identification. Perceived QOL mediates the relationship between self-congruity and destination identification.

Conclusion

This is a preliminary conceptual study trying to integrate distinct literatures from different academic disciplines in order to understand tourist behavior related with self-congruity theory, QOL, and identification concept derived from social identity theory in tourism context. Within the aim of this study, “destination identification” as a new concept for tourism literature is introduced. Why is identification important for tourist consumption? What can be the possible effects of identification on tourist behavior? Identification matters as it has possible positive outcomes. As in organizational behavior literature, organizational identification has outcomes like increased turnover intention, organizational citizenship behavior (Ashforth et al. 2008), and job satisfaction (Tüzün 2009); in consumer behavior literature, it is suggested that identification is a predictor of positive word of mouth and brand loyalty (Kim et al. 2001). However, there is no study that suggests the impact of destination identification on tourist behavior; this conceptual study proposes this relationship for tourists by integrating the related literature. This study tries to understand the importance of the concept for tourists from a micro perspective, but it is interesting that identification is an important construct, as an empirical study suggests that place attachment variables could play an important role in recreation demand models as place identity has a determining power on the number of current trips. According to that study, attachment or identification influences trip choices regardless of the trip cost. Thus, this positive effect of identification is related to the policy context, as short-run effects of price changes have different welfare effects than long-run policy changes where habits and place attachment can adjust (Hailu et al. 2005). This macro perspective sheds light about different positive outcome of place identification. So it can be concluded that identification matters because it has micro and macro positive effects.

Perceived QOL as an antecedent of destination identification suggests that perceived QOL has positive outcome like destination identification, as QOL is the part of meaning-making through tourism consumption. In the proposed model, the moderating role of symbolic and social links to a destination is introduced, as these links will strengthen the relationship between perceived QOL and destination identification, as identification as a strong emotional bond in defining individual's self-concept will be enhanced by these social and emotional links associated with a destination as a part of meaning-making through tourism consumption.

In order to understand the antecedents of destination identification, this first linkage, destination identification and QOL, is the first contribution of the study. Second, current study with micro perspective sheds light on the antecedents of perceived QOL of the tourists. In this manner, the study suggests that self-congruity and tourist satisfaction are antecedents of perceived QOL. In the consumer behavior literature, there is only one study that suggests that consumer well-being and self-congruity are related constructs (Grzeskowiak and Sirgy 2007). This study is different, as it discusses this relationship for destinations. Besides Grzeskowiak and Sirgy (2007)'s study did not support the direct relationship between consumer well-being and self-congruity. In this sense, this study discussing the direct and indirect relationship between self-congruity, tourist satisfaction, QOL, and destination identification will direct the future research. And also, the dimensions of self-congruity, as it was mentioned, are actual, ideal, social, and ideal social. In this study, the possible effects of these dimensions on the examined concepts haven't been discussed. In fact, there is no consensus on which dimension of self-congruity impacts the consumer behavior under different situations and different product groups. Destination image and self-congruity studies also do not suggest any dimension of self-congruity impact on the tourist behavior. It is a well-known fact that underlying motives of self-congruity theory are the self-consistency and self-enhancement. On the other hand, social identity theory states that "identity salience" is the major determinant of the behavior. In other words, identities forming the self-concept become salient under some situations and circumstances direct the behavior of the individuals. Tourism consumption and a specific destination that can be examined from this perspective can give insights into future studies with qualitative designs in order to find out the differing impacts of self-congruity dimensions.

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Chapter 15

An Analysis of Tourism QOL Domains from the Demand Side

László Puczkó and Melanie Smith

Introduction

The aim of this chapter is to examine the relationship between tourism and quality-of-life (hereafter QOL) from the perspective of tourists. This involves an analysis of the demand side of tourism, which includes tourists' motivations for, and perceptions of travel, and the role that this plays in their lives. Surprisingly, few tourism or travel sources were identified which focus directly or even indirectly on QOL (e.g. Campbell et al. 1976; Krupinski 1980; Cummins 1997; Neal et al. 1995, 1999). Most of the research appears to have been based more on the impacts of tourism on the quality of local environments and community life (e.g. Perdue et al. 1991, 1999; Crofts and Holland 1993; Uysal and Noe 2003). A few others refer to the relationship between tourists' QOL and travel (e.g. Olfert 2003; Estes and Henderson 2005), their motivations for travel (Ajzen and Fishbein 1977; Iso-Ahola 1982; Gnoth 1997) and their satisfaction and perceptions (Neal et al. 1999; Puczkó et al. 2011). The most relevant of all the research was perhaps that of Sirgy and Su (2000) or Kim (2002). They concluded that satisfaction with travelling may be related to satisfaction with life and positive changes of QOL.

Firstly, we consider what is meant by tourism and travel, or rather, what tourism and travel mean to people, and secondly, we define and discuss what is meant by QOL in this context. For example, are QOL and satisfaction synonymous? Does travel contribute to any kind of permanent satisfaction or well-being or is it a temporary state of happiness? These questions and others will be answered in the first part of this chapter. The second part of the chapter will consider the applicability of Rahman et al.'s (2005) domains of QOL to tourism ultimately resulting in a more comprehensive conceptual framework for analysing the relationship between tourism and QOL.

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The Relationship Between Tourism, Travel and Quality-of-Life: A Demand Side Perspective

The reasons for travel are many and varied, but the main motivations could perhaps be identified as one or a combination of the following: relaxation, escapism, fun, freedom, hedonism, self-development, education, business, meeting new people, sex, romance, existential or spiritual needs, consolidating friendships and being together with family. Sharpley (1994) refers to five categories of tourist experience: recreational, diversionary, experiential, experimental and existential. The first two are more concerned with relaxation, escapism and hedonism, whereas the latter three are related more to adventure, self-development and 'finding oneself'. Some tourists also travel for spiritual reasons to find meaning in their life. Cohen (1996) describes how the quest for a 'spiritual centre' is an integral part of tourism, especially when people feel socially alienated. Tourism can be seen as a process of self-regeneration as well as relaxation or indulgence (Ryan 1997). Hallab (2006) describes how travel and tourism can make a positive contribution to an individual's health and well-being, and this includes not only physical but also mental improvements (Seaton and Bennett 1996). Smith and Puczkó (2009: 40) state that:

Travel can contribute to all aspects of health if we consider the physical and mental benefits of rest and relaxation, the social aspects of mixing with other tourists and local people, and the intellectual stimulation that can come from learning about new places.

Sometimes tourists travel to make new friendships or to consolidate old ones, or to have much needed quality time with a partner or family. Many people need escapism from routine and freedom from responsibility in the form of relaxation and fun. 'Push' factors in tourism could relate to what Dann and Cohen (1996) describe as anomie in tourism generating societies, which reflects a general normlessness or meaninglessness. For example, Sharpley (2002) describes how alienation (e.g. from work or community) has become an important motivating factor in tourism. Although business tourism is becoming a growth sector, it is more common for people to go on holiday to escape from the pressures of working as well as everyday life. As stated by Krippendorff (1987: 33):

Tourists are free of all constraints... Do as one pleases: dress, eat, spend money, celebrate and feast... The have-a-good-time ideology and the tomorrow-we-shall-be-gone-again attitude set the tone.

It is perhaps rarer for people to travel to confront their problems and engage in self-development, but this is being catered for more recently in the burgeoning wellness and holistic tourism sector (Smith and Kelly 2006; Smith and Puczkó 2009), which offers tourists the chance to deal with their emotional or psychological problems in an environment far away from home.

Sirgy (2008) suggests that life satisfaction can be increased by engaging in life experiences such as travel and tourism events, which can produce a positive affect in important life domains and allow that positive affect to spill over into one's overall life. We can see from the possible motivations listed above that tourism and travel can technically enhance many domains of our lives. However, one of the key questions is whether this enhancement is merely short-lived or whether it can be permanent or ongoing. One trip is unlikely to change our lives (although we often refer to 'the trip of a lifetime'), but the act of travelling on a regular basis can maybe improve the quality of our lives in general. This brings us to a second important question, which is whether we are really talking about QOL or rather happiness, satisfaction, well-being or even wellness. For this, we need to consider some definitions.

The New Economics Foundation (NEF 2004: online) makes a distinction between happiness and well-being: 'Wellbeing is more than just happiness. As well as feeling satisfied and happy, wellbeing means developing as a person, being fulfilled, and making a contribution to the community'. This definition implies that well-being consists of a combination of happiness and

satisfaction as well as personal fulfilment, self-development and social responsibility. The Future Foundation in the UK (2007) showed that ‘personal fulfilment’ was the top priority for 50% of British adults, compared with 25% in 1983. It could be argued that happiness tends to reflect a temporary, subjective emotional state, while satisfaction reflects a more permanent one. Travel usually affords people a state of temporary happiness in which they are on a short-lived ‘high’. Many people exaggerate their behaviour when they are on holiday (e.g. drinking more alcohol, eating richer foods, partying more). Such artificial highs are not long-lasting and could even be damaging if they became part of everyday life. Many people also feel disappointed or ‘flat’ when they return from a holiday, which suggests that travel can only benefit them while they are fully immersed in it. However, maybe these peaks of happiness can contribute to long-term satisfaction if they are repeated often enough, thereby contributing to overall well-being. The anticipation of trips and relived memories can also play a role in prolonging the positive effect of travel (Neal et al. 1995, 1999).

The term wellness currently seems to be used even more frequently than well-being. Dunn (1959) described wellness as a special state of health comprising an overall sense of well-being which sees ‘Man’ as consisting of body, mind and spirit being dependent on his environment. Müller and Kaufmann (2000) suggested that wellness is a state of health featuring the harmony of the body, mind and spirit, self-responsibility, physical fitness, beauty care, healthy nutrition, relaxation, meditation, mental activity, education, environmental sensitivity and social contacts as fundamental elements. It could be argued that wellness as a concept incorporates or balances all of the dimensions of life mentioned so far: well-being, happiness, satisfaction but also health. The National Wellness Institute (2007: online) defines wellness as: ‘an active process through which people become aware of, and make choices towards, a more successful existence’. Their six-dimensional model focuses on the physical, spiritual, intellectual, emotional, social and occupational aspects of life.

However, is well-being or wellness the same as QOL? QOL is arguably a much broader and more complex concept which combines both objective and subjective elements (well-being or wellness is arguably much more subjective, personal and psychological/emotional). Fekete (2006) suggests that QOL combines the material elements of standard of living and welfare with the intangible dimensions of well-being. ‘Welfare’ is defined by dictionaries, like Collins English, as somebody’s health, comfort and happiness and ‘welfare services’ as helping with people’s living conditions and financial problems. Overall, many researchers have concluded that the following three domains are the most important for quality-of-life: health, standard of living and well-being (e.g. Flanagan 1978; Krupinski 1980; Cummins et al. 1994; Cummins 1997; Campbell et al. 1976). In the context of tourism, it could be said that standard of living determines the propensity to travel, i.e. only those with enough disposable income can travel. Travel no doubt improves QOL on many levels, but it is largely the premise of wealthy, western nations. The health of an individual also has an impact on travelling as a person must be fit enough to travel. However, many tourists also travel for health and medical reasons (of which more later).

Domains of QOL and How They Relate to Tourism

Based on all of these definitions, and the motivations and perceptions of tourists, we aimed to develop a framework or conceptualisation which represents the contribution that tourism and travel can make to overall QOL from a demand perspective. This should include physical, spiritual, intellectual, emotional, social and occupational aspects of life, as defined by the National Wellness Institute (2007), including happiness and satisfaction as well as personal fulfilment, self-development and social responsibility (NEF 2004). The domains of QOL as outlined



Fig. 15.1 QOL domains (After Rahman et al. 2005)

by Rahman et al. (2005) were chosen (Fig. 15.1). It was felt that these domains were the most comprehensive of all those in the QOL literature and that these would be the most appropriate for the development of a tourism and QOL model. The following section considers these chosen domains and discusses their applicability to tourism. The aim of this analysis is to consider how far tourism and travel contribute to each of the domains and what kind of tourism products or services has been or could be developed as a result. In some cases, it can be seen that the domains are not directly relevant or that new domains need to be created, re-emphasising the point that tourism needs to be considered as a distinct activity in QOL research.

Health

Health has always been a major factor in tourism, with governments in the early part of the twentieth century recognising the need for workers to have paid holidays for rest and relaxation. In some countries, governments have gone so far as to develop models of social tourism, whereby citizens are offered vouchers or holiday cheques as part of their pay package or as incentives (e.g. see Puczkó and Rátz 2011).

Health tourism has existed for centuries, whereby people travel from one climate to another to improve their health. For example, city and factory workers commonly went to the seaside, whereas middle-class tourists would go to spas or to mountain retreats. Citizens of northern countries typically travel south to gain benefit from the warmer climate. However, in recent years, the health and wellness tourism sector has grown exponentially (Bushell and Sheldon 2009; Erfurt-Cooper and Cooper 2009; Smith and Puczkó 2009). This includes visits to spas, thermal baths, wellness hotels, clinics for medical procedures and holistic or spiritual retreats. Henderson (2004) differentiates between travelling for reasons of wellness (e.g. spas) and travel

for reasons of illness (e.g. medical procedures). Clearly, the motivations of tourists are different depending on whether they are travelling for specific medical treatments or just to enhance their general sense of well-being.

Smith and Puczkó (2009) outline the relationship between leisure, lifestyle and tourism, listing the following as being important elements in health and wellness tourism: medicine (traditional and alternative or complementary), nutrition, therapy and healing, psychology (including self-help, life-coaching and counselling), cosmetics and beauty and rehabilitation (for illnesses as well as addictions). The types of tourism products that are being developed as a result include medical tourism (surgical and cosmetic), spa tourism (beauty, leisure and medical), holistic tourism (body-mind-spirit activities), spiritual tourism and occupational wellness tourism (i.e. related to work-life balance and stress management).

Work and Productivity

Workers have always benefited from a break and an excuse to ‘recharge their batteries’; hence, as mentioned in the health section above, governments and employers frequently support paid leave. It is generally considered to be desirable to have long periods of paid leave when holidays can be taken; hence, long working hours (e.g. UK, Hungary) and short vacation times (e.g. USA, Japan) may be impediments to travel. However, there is not always a correlation. Leisure trends suggest that even those who have little free time manage to travel as regularly but for shorter periods of time (e.g. Tyrell and Mai 2001). Eurofound (2007: 13) stated that ‘The majority of people would prefer a balanced life and Europeans who report a favourable work–family balance are most likely to also report higher levels of quality of work and life satisfaction’. Honoré (2005) writes about the benefits of embracing the so-called slow movement, which includes working shorter hours and having regular breaks. He notes that in the countries where the working day and working week are relatively short (e.g. Scandinavia, France), workers and their companies are more productive. Although paid leave is only one factor in the quality of work/quality-of-life equation, it is arguably an important one as many companies are becoming more and more concerned about work-related stress and subsequent absenteeism.

The phenomenon of business tourism should also be mentioned here, since it is one of the largest growth sectors in tourism. Business Tourism Partnership (2005) estimated that over the past 10 years, there has been a 53% increase in business tourism. Davidson and Cope (2002: 3) describe business travel as ‘all trips whose purpose is linked with the traveller’s employment or business interests’, and IMEX (2006: online) defines business tourism as ‘the provision of facilities and services to the millions of delegates who annually attend meetings, congresses, exhibitions, business events, incentive travel and corporate hospitality’. The term ‘MICE’ is also used frequently in the field of business travel and tourism, which stands for ‘Meetings, Incentives, Conferences, Exhibitions’. Sometimes special events are added (MICESE). Conferences are considered to be relatively pleasurable for delegates and usually include social and cultural programmes in addition to the work element. There is often a connection between personal productivity and work-related travel, with many companies offering incentive trips to their employees to improve occupational wellness, such as spa visits or long weekends (Smith and Puczkó 2009).

Material Well-being

Tourism is seen as extremely desirable for most destinations as it can ultimately increase the material well-being of a country and its citizens in terms of socio-economic impacts. However,

this chapter focuses instead on tourists; therefore, we need to consider how far tourists' material well-being is affected by their travelling habits. Of course, one (simplistic) view would be that tourism is a relatively expensive activity which drains rather than enhances individual finances. However, this must be weighed against the positive benefits which are afforded by the experience of travelling (e.g. emotional well-being). In terms of demand, the flows of tourists in the world tend to go from wealthy western and northern countries to poorer southern or eastern ones. The propensity to travel is based on an individual's economic situation; therefore, traditionally, only an élite could afford to travel regularly if at all. This includes their standard of living, amount of disposable income, but also their willingness to spend their disposable income on travel. Travel has become something of a status symbol for the wealthiest tourists, especially when visiting specific destinations which are seen to be fashionable, or staying in the world's finest hotels (e.g. those in Dubai). On the other hand, in many countries, domestic tourism or Visiting Friends and Relatives (VFR) may be the only forms of tourism that many people can undertake as their material well-being is limited. During times of recession, domestic tourism tends to grow even in the world's biggest generating countries of international tourism. Nevertheless, it is also worth noting that travel and tourism are becoming more and more affordable thanks to the advent of budget airlines and budget accommodation options. This means that the 'masses' also have enough material well-being to consider some kind of tourism and thus enhance their quality-of-life.

Emotional Well-being

Emotional well-being may refer to free time, religion or spirituality, ethics, morals, recreation and hobbies (Fekete 2006). Here we could add the domain of travel, including the anticipation of a trip, the trip itself and post-trip satisfaction, which can all contribute to emotional well-being (Neal et al. 1995, 1999). Smith (2003a) questions whether tourism is about escapism or 'finding oneself', concluding that more and more tourists are interested in improving what might be described as their long-term emotional well-being in a place far from home. Graburn (2002: 31) suggests that 'the relationship between an inner and outer metaphor may be the key to understanding tourists' motivation, expectations and satisfactions', Wang (1999) discusses the notion that many tourists are likely to go in search of their own existentially authentic selves, rather than merely seeking 'objective' authenticity (i.e. that of the destination and its inhabitants' culture), and similarly, Seaton (2002) describes tourism as being as much of a quest to *be* as a quest to see.

A good example of the kind of trip which focuses on emotional well-being is holistic tourism. Smith and Kelly (2006: 15) state that 'Holistic tourists' inner journey will be equally if not more important than the outer one'. Holistic tourism tends to be mainly offered at retreat centres which can be a place for quiet reflection and rejuvenation, an opportunity to regain good health, and/or it can mean a time for spiritual reassessment and renewal, either alone, in silence, or in a group (Retreats online 2006). Activities include yoga, meditation, massage, psychological workshops (e.g. life-coaching, dream analysis), sports and creative expression through arts, crafts, dance, drama or singing.

Although backpacking has traditionally been dominated by young people and students, it is increasingly attracting middle-aged tourists, 'who perhaps reach a mid-life crisis and can give their life some new perspective and meaning' (Smith et al. 2010: 18). Richards and Wilson (2004) explore the idea of backpacking as being a form of nomadic experience which is a response to the alienation of modern society. For example, some of the authors in Hannam and Ateljevic (2007) comment on the ability of middle-aged women to find new freedom and express their hybrid identities through backpacking. Backpacking is also thought of as a form of

self-development. Richards and Wilson (2004) suggest that long-distance youth travel of this kind is primarily based on the collection of unique experiences, building on self-identity narratives and enjoying an element of risk and adventure.

Some of the more covert forms of tourism such as sex tourism and gay tourism allow travellers to improve their emotional well-being in a setting which may be more tolerant than home. Smith et al. (2010: 155) suggest that 'The idea of divorce, or liberation from the 'Self' of everyday life, is a consistent and constant feature of both male and female hetero- and homosexual justifications of their incursions into sex tourism' and that 'Many GLBT (Gay, Lesbian and Bisexual Tourists) need the "escape" of vacations to be the "self" or the "other" they cannot usually manifest due to family, work, and religious restrictions'.

Arguably, all forms of tourism have some connection to emotional well-being; however, it is not a primary motivation in many cases, and it is less common for tourists to make enhancing their long-term well-being a priority (i.e. through holistic tourism) than to engage in short-term hedonism.

Although Fekete (2006) mentions spirituality as being a part of emotional well-being, it could be argued that a separate domain is needed for spiritual well-being, especially given the growth of both religious and non-religious tourism.

Spiritual Well-being

Sociological research has suggested that the development of more individualistic cultures and societies has increased social alienation, rendering a greater need for seeking spiritual solace. Heelas and Woodhead (2005) observe that a slow but steady spiritual revolution is taking place in which secular spirituality is taking over from traditional religion. Spirituality is a holistic discipline which is not limited to the 'explorations of the explicitly religious' but considers all aspects of the spiritual experience, namely, 'the psychological, bodily, historical, political, aesthetic, intellectual and other dimensions of the human subject' (Schneiders 1989: 693). Davie (1994) described spirituality as 'believing without belonging', which arguably suits more individualistic and secular societies.

Cohen (1996) describes how the quest for a 'spiritual centre' is an inherent part of tourism, especially when people feel socially alienated. Spiritual tourism can include pilgrimage, meditation, visits to spiritual landscapes or buildings. Increasingly, non-religious tourists are going on pilgrimages. Magyar (2008) provided a list of the most popular spiritual destinations in the world based on information collected from spiritual travel websites.

- Jerusalem (Israel)
- Mecca (Saudi Arabia)
- The Vatican and Rome (Italy)
- Tibet, Nepal and Mount Everest
- Goa and Benares (India)
- Machu Picchu (Peru)
- Egypt
- Mount Fuji (Japan)
- Navaho Region (USA)
- Rio de Janeiro (Brazil)
- Alaska (USA)

Although many of the destinations include specifically religious sites, others are based on landscape, suggesting that spiritual well-being can be enhanced through contact with nature, especially awe-inspiring locations.

Social and Cultural Well-being

Tourism has few connections to the concept of community as it is traditionally thought of in QOL literature (e.g. Sirgy and Cornwell 2001), as tourists actually tend to leave behind their local community in order to travel. However, they often visit another (local) community or communities in the destination(s) visited. Thus, much has been written about so-called host-guest relations and community-based tourism (e.g. Smith 1977, 1989; Mathieson and Wall 1992; Nash 1996). For some tourists, local communities are an inherent part of the attraction of travel, for example, Cohen (1972) writes about 'non-institutionalised' tourists, which he calls 'drifters' and 'explorers', or which Plog (1974) named 'allocentrics'. Such tourists tend to visit under-explored places where they can interact with local people. This is sometimes known as 'indigenous tourism' (Butler and Hinch 2007). Smith et al. (2010: 150) describe how:

confrontation with other cultures and customs, is central to the idea of tourism. To travel is to embark upon a voyage of discovery: self-discovery through contrast and reaffirmation with respect to the Other.

However, as this chapter is more concerned with tourists than local communities in a destination, it perhaps makes more sense to add a QOL domain entitled Social and Cultural Wellbeing, which relates to the formation of new social relationships and cultural exchange through tourism. For many tourists, a sense of temporary community might be discovered through the company of other tourists who are not friends or relatives. This is true of most forms of group travel (e.g. mass package tours to sun-sand-sea destinations). It can even include being involved in virtual communities of travellers exchanging advice and tips (e.g. online blogs). Bauman (2001) has argued that communities are becoming more dislocated and fragmented in modern society; therefore, many tourists may actually be travelling to find a community. Dina Glouberman (2002) describes how her desire to establish the well-known holistic holiday centre *Skyros* was partly based on her own yearning for community. It is interesting that the *Skyros* company also encourages people post-trip to join a virtual community of tourists who have previously visited *Skyros*.

Some forms of tourism are inherently about belonging to a group, for example, religious tourism. Turner (1978) considered pilgrimage to be a practice through which people enter a liminal state when they leave the confines of their profane lives, and experience a feeling of 'communitas' with other pilgrims while normal social restrictions are temporarily suspended. Devereux and Carnegie (2006) suggest that charity treks and other forms of voluntary tourism can also create a sense of community and social responsibility which is core to well-being (NEF 2004) and ultimately to QOL. Charity treks are adventure holidays or expeditions in which people earn the right to participate by raising a sum of money over and above the real cost of the trip so that a donation can be made to a charity concerned.

In tourism, we may be considering a wider definition of community in the context of QOL which takes into consideration global and virtual communities, as well as local ones. However, Bauman (2001) also suggests that the 'global elite' (i.e. frequent travellers) may be less concerned with a sense of place and community living as they do in a state of 'exterritoriality'. They actively seek out what Augé (1995) has described as 'placeless' spaces such as airports, chain hotels and conference centres. This is especially true of business tourists.

Personal Safety

Personal safety is a major issue in tourism, especially in recent years where terrorism and crises have started to plague the tourism industry on an increasingly and frighteningly more regular basis. Equally, climate change and global warming are starting to have an impact on the incidence

of natural disasters. Safety in transport is also paramount in tourism, especially with the number of flights in operation today. Smith et al. (2010) list the following possible crises which can affect tourism: terrorism, disease, food poisoning, transport disasters, political unrest (e.g. riots), natural disasters (e.g. earthquakes, hurricanes, fires, volcanoes), crime, kidnapping and war. Crisis management has become essential in tourism, as stated by Faulkner (2001: 135) 'Tourism destinations in every corner of the globe face the virtual certainty of experiencing a disaster of one form or another at some point in their history'. Crises can affect the image and reputation of a destination for many years as tourists are naturally very safety and security conscious.

However, it is not just these relatively rare but extreme crises which concern tourists. Many travellers seek out safe and secure destinations where they do not have to encounter any culture shocks. The tourist enclave is a common phenomenon in many beach destinations, especially all-inclusive resorts where the tourists do not even leave the compound for the entire duration of their stay. Cohen (1972) referred to 'institutionalised' tourists, who are thus called because they are heavily dependent on the tourism industry to organise their travel. The individual mass tourist and the organised mass tourist fall into Plog's (1974) categories of psycho- and mediocentrics and tend towards established destinations, offering security, familiarity and comfort. Such tourists seek out safe spaces and tourist 'bubbles', e.g. returning to same destination every year, staying in all-inclusive hotels and eating in chain restaurants. Dann (1996) has even argued that many tourists are frequently and willingly treated like children by the travel industry.

Nevertheless, there are other categories of tourist who have very different motivations, and use travel to overcome their fears, and push themselves to new limits, for example, extreme adventure tourism. Swarbrooke et al. (2003) identify some of the core characteristics of adventure, which include challenge, novelty, excitement, stimulation, escapism, exploration, absorption, emotional contrasts, danger and risk.

Quality of Environment

Sirgy and Cornwell (2001) emphasise the importance of environmental quality and aesthetics to QOL. In tourism, aesthetics has always been an important component, with tourists travelling to visit the world's most beautiful landscapes and monuments, for example, the Seven Wonders of the World or World Heritage Sites. De Botton (2002) describes how travellers are attracted to 'sublime' landscapes that benefit their soul by making them feel small, yet part of an infinite and universal cycle.

The search for pristine environments is an inherent part of tourism. Smith (2003b) discusses the tourists' quest for 'paradise', where the quality of the environment is paramount. Part of this is derived from the desire to be the first person to witness a destination before it becomes spoilt by other tourists. For example, the search for the perfect beach was very well encapsulated in the novel by Alex Garland (1996) 'The Beach'. Ironically, this suggests that tourists are often seeking to enhance their own quality-of-life at the expense of destinations and their inhabitants. Another instinct is to visit places before it is too late and they become irreparably damaged. As noted by Smith (1997: 141), certain travel modes, such as ecotourism, adventure and wilderness tourism, 'posit a vague awareness of diminishing resources that individuals should *see while they still can*'.

On a more positive note, many tourists are actively seeking more sustainable forms of tourism in which they might even play a role, for example, conservation holidays or voluntary tourism with a focus on environmental enhancement. A 2007 Mintel report found that 9% of their respondents expressed a desire to volunteer on an aid or conservation project as part of a future holiday. Nevertheless, there is some cynicism about the motives of ecotourists, for example, Wheeler (1993)

coined the term ‘egotourists’ for those who travel to far flung destinations by environmentally polluting aircraft in an apparent attempt to save the planet. However, it is undeniable that the quality and aesthetics of a destination are crucial to both the short-term and long-term success of a destination and the quality of experience for those visiting. Of course, ultimately the most environmentally conscious tourists would be those who choose not to travel, hence the growing popularity of ‘staycations’, which involve staying close to home and enjoying local day trips and attractions.

Relationship with Family and Friends

Tourism can help to strengthen relationships with family and friends by either going on a holiday together or travelling to see those family members or friends who live in another place (commonly known as VFR or Visiting Friends and Relatives). Of course, there is a certain amount of idealism present in the notion of a perfect family holiday, a relaxing week with relatives or a romantic break for two, but the tourism industry is constantly dealing with dreams of the ideal life; therefore, most people buy into this hope.

Many people also travel in the hope of making new friends, for example, those who go on singles holidays looking for romance or company, and those going on group package tours or special interest holidays with like-minded people. For example, Dann (2001) suggests that senior tourism (over 1960s) may provide a chance for friendships or romantic relationships with people of a similar age and opportunities for new experiences and reflection, thereby fostering a sense of purpose. Several authors have written about sex and romance tourism in recent years (e.g. Clift and Carter 2000; Ryan and Hall 2001; Bauer and McKercher 2003). Although many forms of sex tourism are covert and exploitative, others are more open and merely represent hedonism and freedom, e.g. 18–30 holidays. Many women are increasingly travelling for so-called romance tourism and spend their holidays with local male escorts. However, the most common form of romance tourism is weddings and honeymoons. Gay tourism is also growing (e.g. see Clift and Carter 2000; Hughes 2006; Waitt and Markwell 2006). Gay tourists travel to destinations where they feel comfortable and also to meet other gay travellers.

There are some clear overlaps between this domain and that of being part of a community (for example, we often talk about a ‘gay community’). However, many people in this domain travel with their families or friends and thus feel little need to ‘commune’ with others. It is more likely that single travellers will look for a like-minded community of people to spend time with.

Conclusion

The relationship between the domains of QOL and tourism demand, as outlined partly by Rahman et al. (2005) and modified by the authors, could be summarised as presented in Table 15.1.

It can be seen that some forms of tourism tend to be more closely connected to certain domains than others. However, it should be noted that all forms of tourism affect or are affected by all of the domains to a greater or lesser extent. We can see this in the example of health and wellness tourism, but we could equally have discussed ecotourism, cultural tourism, beach tourism, etc. and have drawn the same conclusion:

- Health and wellness tourism is fairly expensive unless subsidised by governments as a form of social tourism. Therefore, *material well-being* is essential to be able to afford it.
- Visitors are travelling primarily for *health* reasons.

Table 15.1 The relationship between the domains of QOL and tourism demand

Domains of QOL		Typical typologies of tourism, destinations and activities
Material well-being	Material well-being determines the propensity to travel and the types of tourism and activities undertaken	Wealthiest tourists enjoy luxury travel, 5 or 6 star hotels, golf, sailing, shopping Less well-off tourists stay in their own country and may visit friends or relatives (VFR)
Health	People must be healthy enough to travel, but they might also travel for health reasons	Health, wellness and medical tourism
Health/work and productivity	Governments have traditionally supported paid holidays because they are seen as a improving the health and lives of citizens	Social tourism; health tourism; occupational wellness tourism
Work and productivity	Many people travel to escape from work, but holidays tend to improve their productivity on return	All forms of tourism but especially sun-sea-sand breaks with a focus on relaxation
Work and productivity	Many people travel for work reasons (e.g. business and conference tourism), and sometimes travel is offered as an incentive to improve occupational wellness	Business tourism; conference tourism; wellness hotels; spas
Quality of environment	Tourists often want to be the first to witness a pristine landscape	Wilderness and adventure tourism
Quality of environment	More socially responsible and environmentally conscious people choose sustainable or ecotourism, or may not even travel at all	Sustainable tourism; ecotourism; voluntary tourism, 'staycations'
Emotional well-being	Enhancing emotional well-being is perhaps the most important motivation in tourism, whether it relates to escapism, relaxation, recreation, freedom, hedonism or some kind of existential quest	Holistic tourism
Spiritual well-being	Tourists seek greater or higher meaning in life through travel	Religious and spiritual tourism
Social and cultural well-being	Many tourists leave their own community (or lack of community) to enjoy social encounters and cultural exchange with other tourists and local residents	Package tours; special interest ('hobby') tourism; holistic tourism
Social and cultural well-being	Some tourists are interested in interacting with local residents in a destination	Indigenous tourism; community-based tourism
Personal safety	Personal safety and perceptions of security determine whether people travel, where they travel to and what activities they undertake	Politically stable countries; chain hotels and restaurants
Personal safety	Some tourists are highly cautious and seek safe spaces, whereas others challenge themselves and undertake high-risk activities	All-inclusive resorts versus extreme adventure tourism
Relationship with family and friends	Many people travel to consolidate existing relationships with friends or family	VFR; romance tourism; family holidays

- Health tourism can increase productivity at *work* as employees are physically and mentally recovered and rested. Some employees may even undertake occupational wellness tourism.
- Health tourism is dependent on the *quality of environment* as health tourists seek clean landscapes, air, water and facilities. Sanitary conditions are essential for medical tourism in particular.

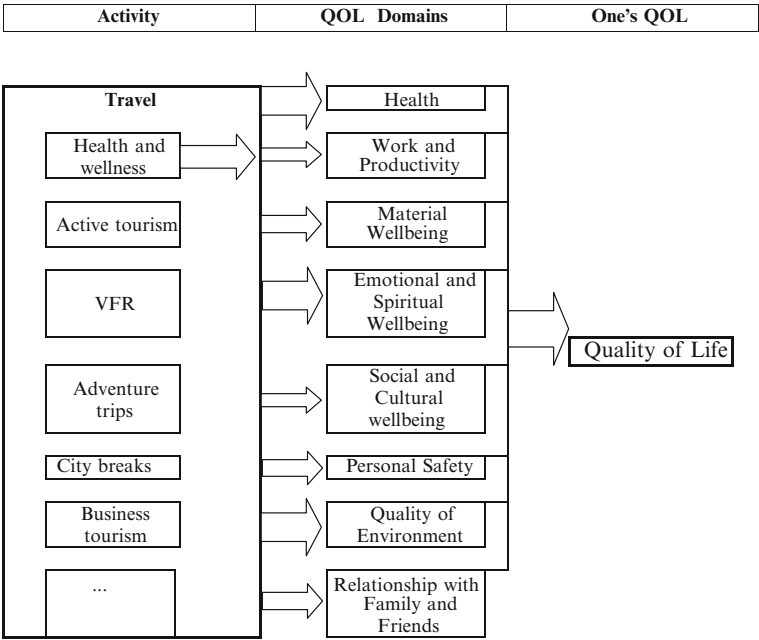


Fig. 15.2 Influence of travel on the domains of QOL

- Health tourism and especially holistic or spiritual tourism can help to improve peoples’ *emotional and spiritual well-being* as they can engage in self-development.
- Health tourists often travel alone but can improve their *social and cultural well-being* through contact with tourists and local people who have similar problems. This can help them to share experiences and recover more quickly.
- Health tourists generally seek *safe* and secure environments and comfort as they want to focus on healing their physical body, mind or spirit without distraction or fear.
- Health tourists, especially medical tourists, may take along *family or friends* as accompanying travellers for moral support. Many spas and wellness facilities (e.g. hotels) are also increasingly attracting families with children, or couples looking for a romantic break.

It is assumed that travel can and has significant impact on one’s quality-of-life. As we showed the example of health and wellness tourism, the type of tourism in question may have a different influence on the domains of QOL (see Fig. 15.2).

Certainly, other forms of tourism would have a different relationship set with the QOL domains, but the core relationship of travel with QOL remains the same, i.e. the very strong inter-linkages.

Conclusion

The relationship between tourism and QOL is fairly complex, in the sense that it is difficult to estimate how far tourism and travel have a long-term impact on peoples’ everyday lives. It must be reiterated that the majority of people outside the western world never have the chance to travel, except perhaps domestically for reasons of VFR. However, in certain regions of the world, tourism is still a major growth industry, and increasing numbers of tourists are travelling from what were once considered to be developing countries, such as India and China. Therefore, we must conclude that travel is an important aspect of many peoples’ lives, whether it is for work or pleasure.

It seems to be the act of travel rather than particular trips which has an influence on peoples' sense of QOL. This can be increased with regular travel and extended by anticipating trips and enjoying post-trip memories. Still, tourists usually travel for reasons of escapism from everyday life or work instead of seeking enhancement of their life or work; therefore, the benefits may be short-lived. However, companies tend to report greater productivity when workers have regular breaks and holidays. In addition, increasing numbers of tourists are travelling with the primary motivation of improving their health or emotional and spiritual well-being through holistic activities or spiritual tourism. Some tourists travel to express their true selves and to meet like-minded people which may be difficult in their home society (e.g. gay tourists). Other tourists travel to consolidate existing relationships or to make new ones, which enhances their social and cultural well-being.

Overall, it is clear that tourism has an important relationship to all of the domains of QOL as outlined by Rahman et al. (2005) and others, but there needs to be a degree of adjustment to suit the demand side of the industry. For example, the inclusion of a domain on social and cultural well-being is more relevant than one which refers to local community. Spiritual well-being is seen as important enough in tourism to warrant a section which is separate from emotional well-being. Quality of environment tends to refer to the tourists' search for attractive and pristine landscapes rather than the environmental impacts of tourism, which are more the concern of the destination and its inhabitants.

In terms of future research as well as tourism management and legislation, it would be interesting to adopt a more holistic approach to analysing the relationships between the domains of QOL and tourism, to evaluate whether some forms of tourism contribute to QOL more than others, and whether QOL is based on the act of travelling generally or on satisfaction levels with specific trips. More research might encourage governments to support social or health tourism or even tourism generally, employees might offer more tourism-related incentives to their workers to improve productivity and morale, and the tourism industry could market tourist products or destinations as contributing to quality-of-life. This chapter has demonstrated that although the importance of tourism to QOL has been underestimated in past studies and research, this oversight can easily be redressed for the benefit of multiple sectors, not least the tourists themselves.

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Chapter 16

Perceptions of Tourism Impacts and Satisfaction with Particular Life Domains

Philippus Stephanes (Stefan) Kruger

The traditional idea that improved health on holiday is an anticipated consequence of escape from work and the movement to a place with a cleaner (or warmer) environment, seems to become a central theme of tourism in an active rather than a passive sense.

Chen et al. 2008:107

Introduction

Tourism is a departure from everyday experience. It is the temporary exchange of an everyday reality for another (Lengkeek 2001). Lengkeek (2001) describes tourism as an experience that contrasts with the daily routine. This can mainly be identified by “signs” bringing significances to the attention of the tourist. Tourism is therefore mostly a sensation of place and the social world. Tourism is holistic. This concept refers to the total experience a traveler (tourist) has with one particular organization’s service and the service provided by the interrelationship of various tourism industries (Obenour et al. 2006).

The Tourism Experience

Medlik and Middleton (1981), Bennet et al. (2005), Saayman (2007), and Neal et al. (1999) all suggest that the product a tourist buys covers the complete experience from the time a tourist leaves home for travel purposes until the tourist returns home. Steyn (1972) identifies five distinct phases of the tourism experience. These phases are involved in a vacation, in a trip away from home, in leisure experiences, or even attending an event. An understanding of these phases is important when describing the total tourism experience. However, the aspect that differentiates the tourism product from other products and services is the tourist experience itself.

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Planning Phase

This phase precedes both the journey and the stay at the destination. It includes such activities as making decisions about the destination, the type of accommodation, the route, and the mode of transport. This phase is influenced by previous experiences, by word of mouth, by media reports and, usually, by marketing material. Robinson (1976) suggests that the anticipation and planning of a trip may be just as enjoyable as the trip itself. Therefore, these form part of the total experience.

Journey Phase

The journey phase involves the physical movement of the tourist by means of the chosen travel mode. This phase takes the tourist beyond his home or work environment. According to Murphy (1985), “getting there is half the fun.” Travel costs have come to represent an important item in the travel budget. Future increases in the costs of travel can be expected to have a major effect on the distance that tourists will be prepared to travel.

Destination Phase

The destination phase generally represents the objective of the trip, and is usually regarded as the highlight of the trip. During this phase, tourists make use of tourism products such as attractions and facilities at or near the destination. These may include accommodation, food and beverage service, nightlife, and entertainment.

Return Journey Phase

This phase refers to the tourist’s psychological state and attitude. Tourists are often tired, apathetic, and even resentful, about the prospect of returning home and to work. Returning to the normal routine of everyday life does not excite tourists. The excitement levels are less and tourists often merely want to get back home. Tourists in this phase have a very different mindset than those excited by the planning phase.

Revival/Memory Phase

After arriving home, the tourist relives the trip experience. This could have either a positive or a negative affect on the tourist. This is the one aspect of the tourism experience that differs from a pure service product. It requires that a tourist can recall the experience, whereas this might not be the case with a pure service product.

Therefore it is vital to identify the tourists’ needs, and to accommodate those needs, to create tourist satisfaction. From a tourist point of view, tourism services are always the product of a package of individual services. All of these services are linked as a chain. Each individual service

“happening” leaves its mark and plays a role in the development of the total holiday experience (Koch 2004). Therefore, tourism service providers need to know the link between tourist satisfaction and the tourists’ experiences, and to know how to provide services that will positively contribute to the total tourist experience.

Tourist Positive and Negative Trip Experiences

Most tourism satisfaction research has considered tourism experiences as a temporary, rather than a permanent, form of tourist satisfaction. Permanent forms of satisfaction have the potential to enhance the quality-of-life (QOL), or well-being, of the tourist (see Dann 1979; Jurowski et al. 1995; together with Kelly et al. 1990). QOL research in tourism has shown that travel to a tourism destination has both direct and indirect positive benefits for the traveling tourist. These include greater levels of happiness, improved health; increased longevity, increased self-esteem, and greater satisfaction with various aspects of life. These occur together with greater overall life satisfaction (see Diener 1984; Kilbourne 2006; Sirgy 2001, 2002).

Previous QOL studies have addressed various issues related to tourism. Tourism is able to enhance and diminish the QOL of local residents in the host community (see Cohen 1978; Linton 1987; Jurowski et al. 1997; Perdue et al. 1999; Sirgy et al. 2000; Williams and Shaw 1988), to contribute to the leisure satisfaction of tourists traveling to a vacation destination (see Jeffres and Dobos 1993; Kelly 1978; Kousha and Mohseni 1997), to prevent reduction of the QOL (see also Cleland 1998), and to improve the QOL of travelers/tourists (as reported by Neal et al. 1999).

QOL studies are either objective or subjective. Objective QOL studies focus on social indicators. Subjective QOL attempts to measure the perceived satisfaction of individuals with their lives (see also Andereck and Jurowski 2005; Diener and Suh 1997; Phillips 2006). Thus, QOL is a multidimensional societal construct that includes both objective and subjective factors. Subjective or objective indicators can be used to measure QOL overall, or within a specific life domain (Samli 1995). Objective indicators are “solid” measures devoid of subjective assessments, such as standard of living, physical health, and personal income. Indices derived from areas such as ecology, human rights, welfare, and education have been sampled frequently as social indicators. According to Diener and Suh (1997), the strength of objective indicators is that they can usually be defined and quantified without relying on individual perception. The greatest limitation of objective indicators is that they may not accurately reflect people’s experience of well-being (Andrews and Withey 1976). Subjective indicators, on the other hand, are mostly based on psychological responses, such as life satisfaction, job satisfaction, and personal happiness. Although subjective indicators seem to offer lower scientific credibility, their major advantage is that they capture experiences that are important to the individual.

Subjective indicators can more easily be compared across domains than can objective measures, which usually involve different units of measurement. This can be achieved by measuring the experience of well-being on a common dimension, such as the degree of satisfaction of a tourist going on a travel trip with various tourism services. Neal et al. (1999) tried to develop a model that could explain the impact of satisfaction with tourism services on overall life satisfaction while going to a tourism destination. Satisfaction with aspects of tourism services plays a significant role in determining overall satisfaction with tourism services. These aspects will include pretrip, en-route, destination, and return trip services. The satisfaction with tourism services combined with the travel trip reflections (perceived freedom from control, perceived freedom from work, involvement arousal, mastery, and spontaneity) provides another significant factor in determining overall satisfaction. Overall satisfaction with tourism experiences and overall satisfaction with leisure time at home play an important role in overall satisfaction with

leisure life. Leisure experiences at home include doing things that are fulfilling after work, feeling good about how one spends leisure time after work, and knowing that leisure time is very important. Overall satisfaction with leisure life and overall satisfaction with non-leisure life (family life, love life and so on) play a substantial role in determining overall satisfaction with life.

Tourist Experience

Tourism literature is rich with studies that observe tourists' travel experiences. According to the WTTC (2010), tourism is one of the world's largest industries and, at that time, accounted for over 10% of global GDP, while transporting over 700 million travelers each year. Tourism is predicted to grow by 4.2% each year between 2007 and 2016. Tourism focuses on people with different demographic attributes and experiences that involve interactions between tourists, destinations, and products. The tourism industry, with its components (accommodation, transport, employees, fauna, and flora), is increasingly subsuming the identity of an experience. Tourists are willing to pay tourism organizers to locate optimal experiences within a limited time frame. Opaschowski (2001) suggests that tourists are looking for emotional stimuli. Tourists want to buy the way of thinking and not products of the larger tourism industry. Tourists want to experience the intangible components and qualities of tourism. They seek ambience, esthetics, and atmosphere, while looking for an experience full of varying intimacies, intensities, and complexities (Opaschowski 2001). Tourists travel to different destinations, interact with people and communities from different sociocultural backgrounds, and bring back memories to share with friends and family. According to McCabe and Foster (2006:194), travel activities become embedded within the totality of lived experiences. Thus, the tourist experience is a social construct where the meaning of the experience is associated with multiple interpretations from social, environmental, economic, and sociocultural activity components of the overall tourist experience.

A tourist has to be motivated to travel. Jang and Wu (2006) defined motivation as a state of need that drives an individual to actions that are seen as likely to bring about satisfaction. The total tourism experience consists of the interrelationship between quality, satisfaction, and value (Chen and Tsai 2007). Quality is obtaining value for money services, and value is the perception of the tourist, better known as perceived value. By understanding what the tourist perceives as value, tourist behavior can be better understood and predicted. Value is the major link in creating tourist satisfaction which plays a role in the tourist's experience (Gallarza and Saura 2006). People visit tourism destinations to have a unique experience. Therefore, the main aim of the tourism industry and its service providers is to create an environment that optimizes positive experiences for tourists (Steyn et al. 2006).

The Influence of Travel on Tourists' Overall Well-being

How do we explain the effect of leisure travel to various tourism destinations on tourists' overall sense of well-being, life satisfaction and/or quality-of-life? The effect of satisfaction with a specific tourism experience on overall life satisfaction will be explained by the *bottom-up spillover theory of subjective well-being* (as noted by Diener 1984; Diener et al. 1999; Sirgy 2002; Sirgy and Lee 2006). Tourism well-being forms part of the bottom-up spillover theory of subjective well-being (Sirgy et al. 2011; Andrews and Withey 1976; Campbell et al. 1976). The literature reviewed shows that satisfaction with an experience is effectively housed in concrete psychological

domains (social life, leisure life, culinary life, and so on). This effect travels from the most concrete domains to the most abstract. The most concrete domains include social life, leisure and recreation, family life, love life, arts and culture, work life, health and safety, financial life, spiritual life, intellectual life, self, culinary life, and travel life. The most abstract domain is the overall sense of well-being. This spillover of effect from the most physical to the most abstract is mediated by an effect housed in various life domains. These domains include social life, leisure and recreation, family life, love life, arts and culture, work life, health and safety, financial life, spiritual life, intellectual life, self, culinary life, and travel life. This is, effect associated with a consumption experience (say, satisfaction with a tourist trip to a resort) related to effect in the 13 life domains that will have an influence on satisfaction with life overall. Many studies had been done on various consumption-related experiences using the *bottom-up spillover theory*. Some studies have found that satisfaction with housing contributes to satisfaction in various life domains (for example, community life, family life, social life, financial life). These, in turn, affect satisfaction with life (Grzeskowiak et al. 2006). Additional studies have found that being satisfied with a hospital stay contributes largely to satisfaction with health life and community life, which then again influence satisfaction with life overall (Sirgy et al. 1994). Another study has shown that life satisfaction can be explained and predicted from satisfaction with experiences within different life domains. For example, people may feel satisfied with their life overall as a direct result of their satisfaction with their job, family, friends, and material possessions (Lee et al. 2002).

Given what we know about the effect of tourism satisfaction on overall life satisfaction, it must be noted that we have very limited understanding of the nature of affect spill over from satisfaction with tourism experiences to satisfaction with life overall. We also have only a limited understanding on the role of positive affect versus negative affect on satisfaction with life overall related to a tourist trip. Positive affect would be meeting new people, and making new friends while on a travel trip. Negative affect might be not feeling safe traveling to a tourism destination. Does a positive affect generated from the most recent vacation trip, in relation to health and safety, contribute to satisfaction with life overall more than the reduction of negative affect? Phrased differently, does a tourist trip have the potential to contribute to the tourist's overall life satisfaction en route to a tourism destination by generating positive affects? These could arise from feeling relaxed and rested, feeling mentally recharged after the trip, and/or the feeling that personal health has improved because the trip required physical activity. In contrast, a tourist trip may contribute to overall life satisfaction through the satisfaction generated because the trip is perceived as not being as tiring and exhausting as feared. Tourists may feel satisfied knowing that they did not get ill during the trip, and may not worry so much about catching easily transmitted diseases. They may not gain much weight by not consuming healthy food while traveling. They did not come across problems with safety or crime. It can be argued that the prevalence of positive affect in the health and safety life domain as well as the *lack of* incidence of negative affect in health and safety domain could both contribute to the overall life satisfaction of tourists. However, the question remains: *Does the incidence of positive affect resulting from a trip in the context of a particular life domain impact overall life satisfaction more than the lack of incidence of negative affect?* If the incidence of positive effect plays a different role from the lack of incidence of negative effect in various life domains, then it is important for tourism officials to use this information to develop marketing programs to enhance tourists' satisfaction with life overall. For example, if researchers uncover the fact that tourists' overall life satisfaction is influenced more by the lack of negative affect in health and safety life than the positive effect in the same life domain, then tourism marketers should pay more attention to services designed to reduce the incidence of negative affect in health and safety than services designed to increase the incidence of positive affect. In this case, tourism managers would allocate greater resources to provide tourists with programs and services to ensure that they do not get ill, become more than usually tired and exhausted, gain weight, or encounter problems with safety or crime. They may also reduce resources in providing services to

enhance relaxation and rest. Research in this case is likely to help tourism managers to better design their programs and services to increase the incidence of positive affect in certain life domains and to decrease the incidence of negative affect in other domains. The overall goal is to maximize tourists’ overall life satisfaction (their sense of well-being, happiness, or quality-of-life). Doing so should reward tourism managers with repeat business and with positive word-of-mouth recommendations. This, in turn, should enhance the profitability of the tourism industry.

Psychological Process of the Bottom-Up Spillover Theory

How does satisfaction with tourism services affect tourists’ life satisfaction? To answer this question, the reader will have to become familiar with the concept of the bottom-up spillover theory of subjective well-being (Andrews and Withey 1976; Campbell et al. 1976; Diener 1984; Sirgy 2002) (Fig. 16.1).

The basic premise of the *bottom-up spillover theory* is that life satisfaction is functionally related to satisfaction with all of life’s domains and sub-domains. Life satisfaction is considered

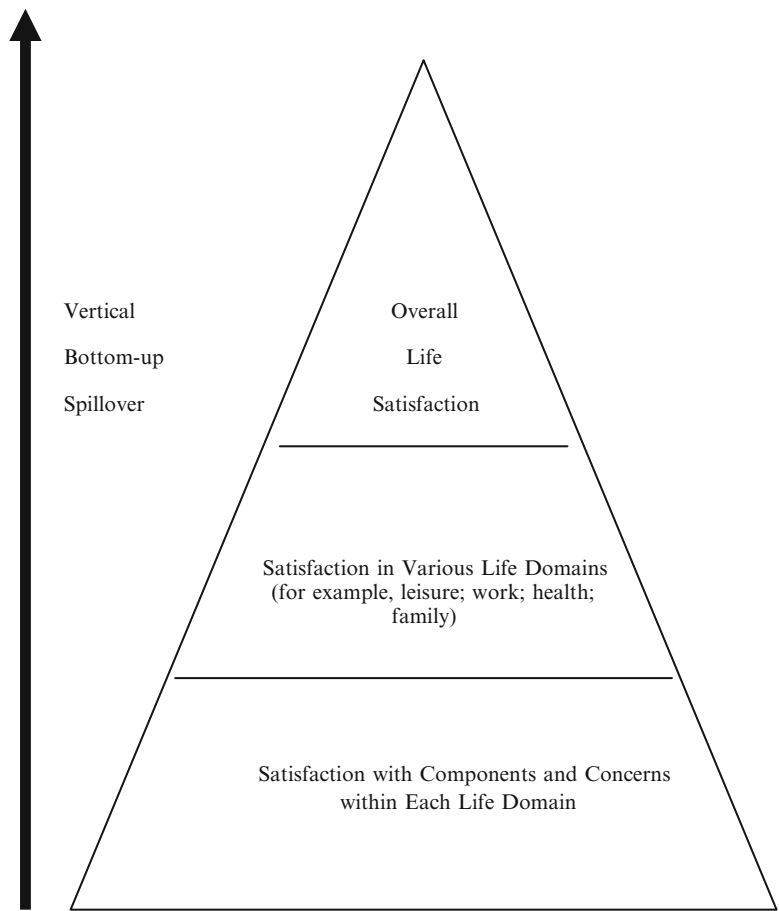


Fig. 16.1 The hierarchy model of life satisfaction (bottom-up spillover theory) (Source: Neal et al. 1999:155)

to be on top of an attitude (or satisfaction) hierarchy. It is influenced by satisfaction with life domains (that is, in this case, satisfaction with health, safety, family, social, leisure and recreation, love, arts and culture, work, financial, spiritual, intellectual, self, culinary, travel, and social life). Satisfaction with a particular life domain, (for example, intellectual life) will be influenced by lower levels of life concerns within that domain (for example, satisfaction with social events related to a tourist trip). That is, life satisfaction is mostly determined by evaluations of individual life concerns. The greater the satisfaction with events experienced on a tourist travel trip, the greater the positive affect and the less negative affect. The events occurring on a tourist trip contribute to positive or negative affect in various life domains (for example, health, safety, family, social, leisure and recreation love arts and culture, work, financial, spiritual, intellectual, self, culinary, travel, and social life). In turn, changes in the positive or negative affect in life domains contribute to changes in subjective well-being (the sense of well-being, overall happiness, life satisfaction, perceived quality-of-life). In other words, the greater the satisfaction with social life, family life, work life, spiritual life, etc., the greater the satisfaction with life overall.

Specifically, *bottom-up spillover theory* recognizes that satisfaction with life as a totality is largely determined by satisfaction with a variety of life domains. It postulates that effect within a specific life domain accumulates and vertically spills over to superordinate domains (that is, to life in general). From this discussion, the effects of satisfaction with certain tourist-related events on satisfaction with various life domains and life overall can be understood. As such, a model of tourism well-being guided by *bottom-up spillover theory* is shown in Fig. 16.2.

The model shown as Fig. 16.2 describes how tourist-related events contribute to positive and negative affect in various life domains that, in turn, spill over to life overall and influence life satisfaction. Specifically, every tourism service is evaluated in terms of its benefits (sources of satisfaction) and costs (sources of dissatisfaction) within a variety of life domains. For example, a tourist on a previous trip may experience a social life positive affect. This feeling of satisfaction may be due to meeting new people, making new friends, spending quality time with friends and sharing mutual interests, and spending time away from home and family. Conversely, a tourist may experience negative affect because not enough time was enjoyed with new friends. Dissatisfaction may arise from having to deal with the obnoxious behavior of accompanying persons. The tourist may have felt that the accompanying people detracted from “personal time and space.” These negative feelings may decrease social well-being, which, in turn, may negatively affect overall QOL.

Positive affect includes feelings labeled as enthusiastic, interested, determined, excited, inspired, alert, active, strong, proud, or attentive. Negative affect includes feelings such as scared, afraid, upset, distressed, jittery, nervous, ashamed, guilty, irritable, and hostile (Bradburn 1969; Diener et al. 1995; Plutchik 2003). Some QOL researchers conceptualize and operationalize subjective well-being as the difference between positive affect and negative effect (Diener et al. 1995). It should be noted that frequency of emotional experience is more important than the degree of intensity of emotional experiences in evaluating affective QOL (Diener et al. 1991).

Quality-of-life researchers have captured the concept of subjective well-being by measuring two types of affect – positive and negative. These scores are then added to give an index of subjective well-being (Kim and Mueller 2001). That is, a person who has a high level of subjective well-being is one who has a preponderance of positive affect (such as joy, contentment, or pleasure) over negative effect (such as sadness, depression, anxiety, or anger). Quality-of-life researchers, using this definition of subjective well-being, formulated measures of subjective well-being that capture both intensity and frequency of positive and negative effect. This is because studies have found that both frequency and intensity of effect contribute significantly to subjective well-being – with frequency contributing more than intensity (Diener and Larsen 1993). Furthermore, QOL researchers have shown that depression and other measures of psychopathology are negatively correlated with measures of subjective well-being (Roberts et al. 1991).

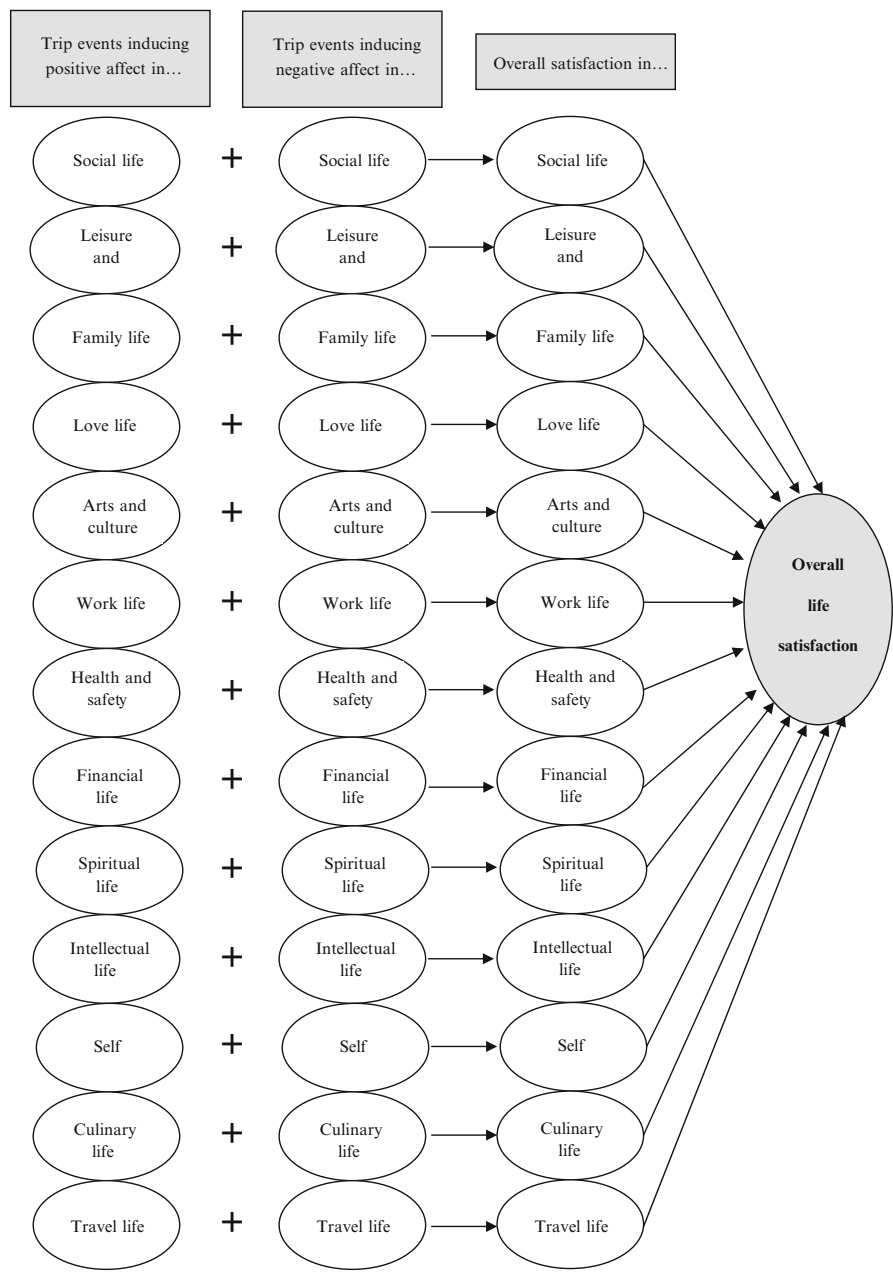


Fig. 16.2 Well-being impact of tourism

Managerial Implications

Let us now turn to the differential effects of positive and negative affect of trip experiences on overall satisfaction with the 13 life domains. A study by (Sirgy et al. 2011) has documented evidence that suggests positive affect induced by trip experiences contributes to overall satisfaction in social life, leisure life, love life, arts and culture, work life, spiritual life, intellectual life, culinary life, and travel life. These life domains are more closely related to higher-order needs than to

the lower orders. The evidence also suggests that positive affect from trip experiences does not seem to contribute significantly to overall satisfaction in health and safety, and self. These life domains seem to be more closely related to the lower order, rather than the higher order needs. With respect to negative affect, the evidence suggests that negative affect from trip experiences does not seem to detract from overall satisfaction in leisure and recreation, intellectual life, self, and travel life. This may be because these life domains are more closely related to the higher-order needs.

When looking at the 13 life domains (Table 16.1), the following explanations will be made to tourism managers with regard to positive and negative affect in these life domains. Tourism managers should avoid negative affect as far as possible, as negative affect will add to a negative quality-of-life experience while on the travel trip.

Social life – Tourism managers should introduce programs and services that address tourists' needs in this life domain such as feeling good and meeting new people. Positive affect includes feeling good making new friends, feeling good spending quality time with friends, sharing mutual interests, and feeling good spending time away from home and family. Sources of negative affect include feeling bad not having enough time with new friends to try to get to know them better, feeling bad for trying to deal with the obnoxious behavior of people accompanying the group, and feeling bad for lacking enough personal time and space due to the intrusion of the accompanying group.

Concerning *leisure and recreational life*, programs and services should include a variety of activities. Positive affect will include feeling good engaging in a variety of recreational activities, experiencing new forms of recreational activities, and doing a fair amount of leisurely reading. Negative affect occurs when too many leisure and recreation activities are provided at the destination, and a tourist might feel bad because s/he was tired from expending too much energy on recreational activities, or feeling bad for reading too much and, therefore, not enjoying the scenery.

In relation to *family life*, tourism managers should include activities for everybody in the family, including paying attention to the family life cycle of tourists visiting the destination. Positive affect occurs when tourists feel good spending quality time with family, getting the whole family together, and trying to achieve balance between work and family life. Negative affect can be feeling guilty spending fun time on the trip without family, feeling bad being unable to get in touch with family due to poor mobile reception on the trip and destination.

Love life – Tourism services should enhance the incidence of positive affect, including feeling good spending time with significant other, feeling good visiting places considered as romantic, and feeling good spending time alone without my significant others. Negative affect occurs through feeling bad for failing to get in touch with a significant other due to poor mobile reception, feeling bad for missing significant others, and feeling bad because one was not able to share the travel experience with significant others.

Tourism managers should help tourists to learn, tolerate and appreciate others' *arts and culture*, as well their own. Positive affects include feeling good learning about other cultures, feeling good learning to appreciate one's own culture, and feeling good experiencing other cultures in the form of music, art, architecture, food, and beverages. Examples of negative affect are feeling bad for failing to communicate with local people because of the language barrier, feeling disgusted towards the local people doing things that are unacceptable in one's own culture and others on the trip not seeming to approve or appreciate one's culture.

With respect to *work life*, tourism managers should ensure that services are provided to help tourists feel good breaking away from daily routine, escaping the demands and constraints of the workplace, and getting a chance to do some work-based strategic thinking and planning during the trip. Negative affect from tourists feeling bad about work life includes feeling bad for being forced to work during the trip, taking away some of one's leisure time, not having enough time during the trip to do some work and being tired and exhausted returning to work.

Table 16.1 Positive and negative affect in various life domains

Life domain	Description
Social life	Tourism programs and services – tourists meet new people, make new friends and spend quality time – positive affect Limited time available while on vacation – feeling bad not having enough time with new friends trying to get to know them better while on vacation – negative affect
Leisure and recreation	Variety of activities, opportunities for new/novel activities, master activities or read leisurely – positive affect Too many leisure and recreational activities provided at the destination – feeling bad being tired and exhausted from spending too much energy on recreational activities – negative affect
Family life	Activities for everybody as a family – positive affect Tourism services to include mobile network coverage at the destination – failing to get in touch with family due to mobile communication problems – negative affect
Love life	Tourism services should enhance incidence of positive affect – feeling good spending quality time with significant other Reduce incidence of negative affect – Feeling bad for failing to get in touch with significant other due to poor mobile reception at the destination
Arts and culture	Tourism services should help tourists learn, tolerate and appreciate other cultures; as well as their own – positive affect Translation services at the destination – feeling bad in failing to communicate with local people because of the language – negative affect
Work life	Tourism services that help tourists feel good when breaking away. Providing activities to feel less stressed – positive affect Tourists to relax more at the destination, share travel responsibilities in the group – feeling bad for being very tired and exhausted coming back to work because the trip was tiring and exhausting – negative affect
Health and safety	Provide services to make tourists feel healthy, safe and good – positive affect Tourism programs and services to ensure tourists safety while on vacation at the destination – feeling bad for worrying about safety and crime – negative affect
Financial life	Help tourists not to overspend – positive affect Effective marketing Tourism programs to provide variety of seasonal and out-of-season packages to cater for a variety of tourists – feeling bad for lacking sufficient financial resources to fully enjoy the trip
Spiritual life	Service that provide spiritual experience through nature – positive affect Service that does not provide spiritual experience through nature – feeling bad because one ended up feeling that one's life is adrift and had little purpose – negative affect
Intellectual life	Develop and market educational services – positive affect Not enough time – Feeling bad for not getting the chance to learn as much as one would have liked to – negative affect
Culinary life	Services resulting in good tasting, healthy, exotic cuisine – positive affect Destination not providing a variety of food and beverages – feeling bad for not having a variety of food and beverages to choose from – negative affect
Travel life	Breakaway, new places, outdoors, enjoy travel and tourism – positive affect Tourism programs marketing practices not trying to retain tourists at the destination – feeling bad for getting tired and feeling exhausted traveling from one destination to the other – negative affect
The self	Service providers to cater for one of the new trends of tourism – include activities for a single person – feeling good spending time alone to learn more about oneself – positive affect Tourism programs and services not providing enough or variety of programs and services – feeling bad because one got bored and felt lonely on the trip – negative affect

Health and safety – Services that help tourists feel healthy, safe, and good for being relaxed, rested, and de-stressed after the trip should be provided. Positive affect includes feeling good for being mentally recharged after the trip, feeling good physically because the trip required physical activity, and feeling good getting a chance to do some work-based strategic thinking and planning during the trip. Negative affect arises from tourists feeling bad for being tired and exhausted after the trip, feeling bad about gaining weight, feeling bad for worrying about getting ill, and feeling bad for worrying about safety and crime during the trip.

With regard to *financial life*, tourism managers should introduce effective marketing practices, helping tourists not to overspend. Positive affect includes tourists feeling good because the trip was worth the money, feeling good for spending money budgeted for travel, feeling good for saving money by being thrifty and looking for bargains, and feeling good for learning how to budget. Tourism programs should provide a variety of seasonal and out-of-season packages to cater for a variety of tourists. This will avoid the negative affect arising from feeling bad for lacking the financial resources to fully enjoy the trip, feeling bad for spending too much money, and feeling bad for spending money on frivolous, unnecessary things.

Spiritual life – Tourism marketers should market services that provide a spiritual experience through nature. The positive affect includes feeling good for learning to appreciate nature, feeling good for getting closer to God, feeling good for getting a chance to think about what is important in life, and feeling good for sharing one's spiritual beliefs with others. Negative affect is a consequence of tourism services that do not provide spiritual experiences through nature and feeling bad because one ended up feeling that one's life is adrift and had little purpose.

Concerning *intellectual life*, tourism managers should develop and market educational services to the broader traveling public, yielding a positive affect. Tourists that feel that they do not have enough time, or feel bad for not getting the chance to learn as much as they would have liked are sources of negative affect.

With respect to *culinary life*, tourism managers should develop and market services resulting in good tasting, exotic cuisine. Those tourists who feel good enjoying good tasting food, feel good eating healthy food, and feel good experiencing new and exotic beverages produce a positive affect. Tourists that feel bad for not having a variety of food items to choose from or that feel bad for not having familiar food and beverages produce a negative affect.

With regard to *travel life*, tourism programs and services should include and compliment tourists who break away from their daily routine. Sources of positive affect include traveling to new places, enjoying the outdoors, and enjoying travel and tourism. Tourism marketers who do not design programs and services to retain tourists at the destination and tourists who feel bad for getting tired traveling from one destination to the other are source of negative affect.

The self – Tourism service providers should cater for one of the trends of tourism, to include activities for a single person on a travel trip. Spending time alone to learn more about oneself leads to a positive affect. Tourism programs and services not providing enough or enough variety and tourists who are feeling bad because they got bored and felt lonely on the trip are sources of negative affect.

Enhancing tourists' sense of well-being will also increase the profitability of tourism operators. Tourists who experience a greater sense of well-being are likely to choose the same tourist operators when making future leisure travel plans.

Suggestions for Further Research

Sustainable tourism could make significant contributions to economic development, to the well-being of the host community and the quality of the environment, while providing high quality experiences for the tourist. The tourist experience spills over to various life domains, influencing

overall life satisfaction either positively or negatively. Therefore it is important that managers of tourism products and services understand this relationship. It is also important that tourists realize and understand the value and influence of tourism on their life satisfaction. A suggestion for future research is that variable population groups (tourists) be further investigated and that research is conducted in various sectors of the larger tourism industry. This work might look at the perceived economic, social, and environmental impacts of tourism, and that all the domains influencing life satisfaction (Family Life, Financial Life, Work Life, Social Life, Love Life, Life, Cultural Life, Religious Life & Health and Safety Life) be measured in the tourism environment. This will allow the determination of the complete level of life satisfaction of tourists and how each of these domains can improve this level of satisfaction.

Conclusion

The reader should pay special attention to the sources of positive and negative affect in the identified life domains, and become acquainted with the *bottom-up spillover theory* of subjective well-being. Experiences gained during a trip to a vacation destination contribute largely to overall life satisfaction. This chapter provides a theoretical basis and contributes to the literature of travel and tourism research, paying specific attention to quality-of-life research.

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Chapter 17

Quality-of-Life and Travel Motivations: Integrating the Two Concepts in the Grevillea Model

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Introduction

Why should tourism destinations worry about people's quality-of-life and travel motivations? In times of economic prosperity, tourism destinations may not need to worry about the role that vacations play in people's lives or the reasons why. In times of economic downturns, like the recent global financial crisis and its ongoing negative effects on economies and people's lives, however, the question of why people would continue to go on a vacation becomes highly relevant.

If taking a vacation does not contribute much to someone's overall quality-of-life, it can be assumed that vacations would be sacrificed when times are tough. Such a situation would be existentially threatening to tourism destinations and the tourism industry as a whole, as demand fluctuates strongly and unpredictably with external circumstances; tourism levels would operate independently of anything the tourism industry might do to control them. If, however, taking vacations forms an important part of a person's quality-of-life, it can be assumed that they will take vacations no matter what they need to sacrifice to be able to do so. Again, this has major practical implications for the tourism industry: If people go on vacation under any circumstance, the tourism industry does not need to worry as much about demand fluctuations and can optimize their guest mix under the assumption of relatively stable demand and competition. The contribution vacations make to people's quality-of-life and the way the construct quality-of-life is determined for marketing purposes are therefore of major consequence to the tourism industry.

The reasons why people travel to certain destinations may not be very important to a destination when there is ample demand for tourism in general. During times where demand drops and competition skyrockets, however, understanding people's travel motivations and defining a suitable positioning for one's own tourism offer become essential. Understanding consumers' travel motivations is important for being able to develop an optimal marketing mix and for securing tourists from the relevant target market.

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For these reasons, both the concepts of quality-of-life and travel motivations are of key importance to tourism industry. Even so, a number of key questions remain unresolved, limiting the usefulness of both the concepts to tourism, namely:

- To what extent do vacations contribute to people's quality-of-life? Is this contribution approximately the same across the entire population, or do groups of people exist who differ substantially in the extent to which vacations affect their quality-of-life?
- Are there base travel motivations that are shared by all tourists or are travel motivations by their very nature different, for different people, at different times in their travel career or at different stages in their lives?
- How are the concepts of quality-of-life and tourism motivations related?
- Is there an association between certain travel motivations and the levels of contribution of vacations toward quality-of-life?

The aim of this book chapter is twofold: (1) to review two bodies of literature – quality-of-life and travel motivations – and derive from this review answers to the unresolved questions above and (2) to propose a conceptual framework that integrates the concepts of quality-of-life and travel motivations in a tourism context.

The Contribution of Vacations to People's Quality-of-Life

Quality-of-life refers to “the individual's experience or perception of how well he or she lives” (Naess 1999), and is usually taken narrowly to mean a person's sense of well-being, his or her satisfaction or dissatisfaction with life, or happiness or unhappiness (Dalkey and Rourke 1973). The idea of quality-of-life comes from the “social indicators movement” of the 1960s, when Bauer (1966, p. 1) commented on the lack of a system for charting social change and coined the term, social indicators to refer to “...statistics, statistical series, and all other forms of evidence... that enable us to assess where we stand and are going with respect to our values and goals and to evaluate specific programs and determine their impact.” Campbell et al. (1976, pp. 7–9) proposed to monitor the conditions of life, by attempting to measure the experiences of individuals with the conditions of life, and defined the quality-of-life experience mainly in terms of satisfaction with life and specific life domains. Thus, the key emphasis of this definition is on the “measurement of human experiences of social conditions” (Land 2004, p. 109). Wilson (1967, p. 294), who reviewed well-being research, concluded that the happy person is a “young, healthy, well-educated, well-paid, extroverted, optimistic, worry-free, religious, married person with high self-esteem, job morale, modest aspirations, of either sex, and of a wide range of intelligence.” Maslow (1962), who based his theory for development towards happiness and well-being on the concept of human needs, characterized the good life as a fulfillment of needs, arranged in a hierarchy of five categories, beginning with the physiological needs and ascending stepwise to the needs of safety, belongingness and love, esteem, and self-actualization.

Although there are competing views about the relationship between quality-of-life and well-being (Haas 1999), quality-of-life generally refers to an evaluation of the general well-being of individuals and societies (Derek et al. 2009) with the key well-being indicator of life satisfaction (Ryff and Keyes 1995). While there are examples of unidimensional definitions of the concept of quality-of-life, the majority of quality-of-life definitions stress the multidimensional nature of the concept, typically manifested in the specification of a number of quality-of-life domains that can be found in health-related studies (e.g., Cummins 1997; Felce 1997; Schalock 1996). Quality-of-life has also been defined solely in terms of life satisfaction. Rejeski and Mihalko (2001) describe the “mainstream psychology” definition of quality-of-life as being “the conscious

Table 17.1 Inclusion of quality-of-life domains in test batteries

Domain	% of test batteries including domain
Work and material well-being	100%
Health	100%
Family and love	79%
Leisure and recreational experiences	64%
Social life	57%
Education/learning	50%
Neighborhood/community	36%
Spiritual life	29%
Vacation	29%
Goals/hopes for the future	21%
Self-esteem/acceptance	14%
Safety	14%
Stress	14%
Transport	14%
Standard of living	14%

cognitive judgement of satisfaction with one's life," a concept that has been operationalized using both unidimensional and multidimensional measures, that is, in terms of satisfaction with life in general or of satisfaction with specific "domains" of life considered separately. Others assume that overall life satisfaction is functionally related to satisfaction within a number of individual life domains, like the satisfaction hierarchy model of Lee and Sirgy (1995).

Thus, at a broader level, quality-of-life is an umbrella concept that refers to all aspects of a person's life, including physical health, psychological well-being, social well-being, financial well-being, family relationships, friendships, work, and the like. Yet, there appears to be surprisingly little agreement on which domains constitute quality-of-life and which domains need to be included in measures of quality-of-life. Perhaps the notion of incorporating a definitive standardized set of domains into quality-of-life definitions is subject to criticism (Keith 2001). This begs the question of whether or not vacations should be included as a separate domain in quality-of-life studies. To answer this question, we conducted a review of published measures of quality-of-life developed for healthy adults.¹ For the purposes of this chapter, we have adopted Frisch's (2000, p. 220) definition of quality-of-life, which refers to "an individual's evaluations of the degree to which his or her most important needs, goals, and wishes have been fulfilled." For this review, we have sourced the original publications explaining each of the 14 test batteries included in the review and extracted the domains that were used to derive the overall quality-of-life score. The details of the review are provided in the Appendix. A summary is given in Table 17.1 that lists the domains in the left-hand column and in the right-hand column, the percentage of reviewed studies, which included each one of those domains in their measure of quality-of-life in the right-hand column.

As can be seen, vacations are infrequently mentioned. Work and material well-being and health are included in all item batteries, followed by family and love, leisure and recreational experiences, social life, and education/learning. All other domains are included in only less than

¹ Note that many test batteries for quality-of-life have been developed for subgroups of the population, e.g., cancer patients, children with disabilities etc. Given the topic of our research, these measures are not relevant, and we have focused only on measures of quality-of-life which have been developed for healthy adults.

half of the item batteries. A number of key conclusions can be drawn from the review of literature and test batteries. First, there is general agreement that total perceived quality-of-life is a composite of satisfaction with a number of domains in life. Second, there is little agreement on the key domains that need to be included to cover the construct of quality-of-life in a satisfactory manner. The only undisputed domains are work, material well-being, and health. Finally, almost two-thirds of test batteries reviewed view leisure and recreation as contributing to quality-of-life, with the contribution to life satisfaction dependent on the amount of time spent in leisure and the value that people attach to their leisure experiences (Shaw 1984). Leisure and recreation and its importance to life satisfaction have been heavily researched in the general quality-of-life literature. For example, Diener and Suh (1997) and Karnitis (2006) acknowledged leisure and recreation as a key domain in quality-of-life. Silverstein and Parker (2002) argued on the contribution of leisure to "successful" old age, a finding supported by Dann (2001), Nimrod (2007), and Coleman and Iso-Ahola (1993). Iwasaki et al. (2005), Iwasaki (2007), and Jeffrey and Dobos (1993) derived the importance of leisure for quality-of-life from the relationship between leisure and stress relief.

However, while leisure is generally accepted as a domain of quality-of-life, vacations are rarely included as a separate domain. Instead, vacations tend to be mostly implicitly covered by the leisure domain. Inclusion under the broader leisure domain, however, prevents the development of understanding of the role of vacations away from home. Such information should be of great interest to tourism destinations and the tourism industry since it provides insight into not only interesting target markets but also aspects such as elasticity of demand.

A substantial amount of work provides support for the need to have a separate vacation domain in quality-of-life. For example, the desire to travel has been argued as a fundamental need and viewed almost as a universal right (Urry 1990, 1995). Vacations are an integral feature of modern life for many people in developed nations and represent a possible avenue for individuals to pursue life satisfaction (Rubenstein 1980). Hobson and Dietrich (1994, p. 23) observed that there is an "underlying assumption in our society that tourism is a mentally and physically healthy pursuit to follow in our leisure time." A number of studies investigating the role of vacations in quality-of-life were not published in tourism journals but provide evidence for the fact that vacations should receive more attention with respect to their potential for improving people's quality-of-life. For example, Card et al. (2006) conducted a study into the role of travel in improving the lives of people with a disability. Sands (1981) found that vacations were associated with increased intellectual functioning of women over 65. Balla and Zigler (1971) discovered that vacations were associated with greater independence and less wariness in institutionalized retarded children.

Vacations have been argued to play a triple role in contributing to quality-of-life by providing (1) physical and mental rest and relaxation, (2) space for personal development and the pursuit of personal and social interests, and (3) a form of symbolic consumption, enhancing status (Richards 1999). Despite the general acknowledgements of the importance of vacations, only a very small number of studies have been conducted to date that investigate the contribution of vacations to travelers' quality-of-life. Neal et al. (1999) were the pioneers of this line of research. They studied people's satisfaction with travel and tourism experiences in the overall quality-of-life context. While this study highlighted the importance of satisfaction with tourism services, it was predominantly focused on service evaluations and satisfaction with the last trip. Therefore, evaluations of the travel experience constituted the majority of the questionnaire while satisfaction with life overall constituted a smaller proportion of the questionnaire. Neal et al. (2004) extended their previous study by examining the role of tourism services in quality-of-life. They discovered that satisfaction with travel services and experiences, trip reflections, and satisfaction with service aspects of tourism phases and non-leisure life domains impact on satisfaction with life in general. Gilbert and Abdullah (2004) investigated whether or not the activity of holiday taking has any impact on the life satisfaction or subjective well-being of those taking vacations.

Their results indicated that such activity changed the sense of well-being of those participating in it. A comparison between a holiday-taking group and a non-holiday-taking group provided evidence that the former experienced a higher sense of well-being before and after the vacations when compared to the latter. Roy and Atherson (1982) found that group vacations promoted positive attitudes and greater quality-of-life in hospitalized dialysis patients. Javalgi et al. (1992) attributed pleasure travel as an important issue affecting the quality-of-life of Korean seniors. Lee and Tideswell (2005) found vacation travel improved the quality-of-life of senior citizens and that it created new interests in their lives.

In sum, although leisure is generally viewed as a key domain contributing to quality-of-life, vacations are not typically regarded as separate. This is despite the fact that there has been a significant body of work demonstrating the positive effects of vacations on people's well-being, as distinct from home-based leisure activities.

The Heterogeneity of the Contribution of Vacations to People's Quality-of-Life

A number of researchers acknowledge that the domains of quality-of-life are not equally important to all people. For example, Murray (1938) argued that the strengths of various needs differ from individual to individual. For example, individuals of one social class may share similar notions of which needs are important to them, and those notions differ across social classes. Gratton's (1980) study found that the majority of the middle class sample was esteem, self-actualization oriented, while the majority of the working class was esteem, belonging oriented. Gratton's assessment of group differences allows a fuller understanding of needs and the importance an individual assigns to their satisfaction. His findings imply that some life domains and aspects of domains will be intrinsically more important than others to particular groups of people, and this difference in domain importance will vary across social class. As a consequence, many of the measures in Psychology (e.g., Frisch et al. 1992) ask people to state their satisfaction with each domain and how important each of the domains is to them. Such an approach effectively acknowledges that: (1) domains are not at all equally important and (2) the importance of each of the domains varies across people and, consequently, no single rigid model of domain importance in quality-of-life can be developed.

To date, only one publication (Dolnicar et al. [accepted for publication](#)) investigates heterogeneity in the contribution vacations make to different people's quality-of-life. Their findings indicate that distinct segments exist, with one segment viewing vacations as a core (essential) contributor to quality-of-life; another segment considering vacations as non-essential, but having an enhancing effect on their quality-of-life; and a third segment viewing vacations as playing no role whatsoever on their quality-of-life.

Travel Motivations

Pearce (1982) defines motivation as psychological/biological needs and wants, including integral forces that stimulate, direct, and amalgamate a tourist's behaviors and activity. Travel motivations refer to why tourists decide to engage in something, the time they are willing to sustain that activity, and how intensively they are going to pursue it (Dornyei 1994). Thus, travel motivations provide insight into the psychology of tourist behavior (Goeldner and Ritchie 2003) because motivations are seen as the driving force behind all actions (Crompton 1979b; Fodness 1994).

Understanding what motivates people to travel allows researchers to better define the value of tourism behavior and ultimately predict or influence future travel patterns (Uysal and Hagan 1993).

The “push-pull factor” theory of tourism motivation by Dann (1977) is perhaps the most recognized theory within the realm of tourism research. In answering the question, “What makes tourists travel?,” Dann (1977) indicated that there is distinction between pull and push forces. The push factors are considered to be sociopsychological motivations that predispose the individual to travel, while pull factors are considered to be external, situational, or cognitive motivations that attract the individual to a specific destination once the decision to travel has been made (Uysal and Hagan 1993). These forces describe how individuals are pushed by motivation variables into making travel decisions and how they are pulled or attracted by destination attributes (Uysal and Hagan 1993). Push motivations can be seen as the desire for escape, rest and relaxation, prestige, health and fitness, adventure and social interaction, family togetherness, and excitement, while pull motivations are those that are inspired by a destination’s attractiveness, such as beaches, recreation facilities, cultural attractions, entertainment, natural scenery, shopping, and parks (Yoon and Uysal 2005).

A number of studies empirically identify motivations of travelers using the concept of push and pull factors. For example, Yuan and McDonald (1990) examined the motivations for overseas travel and found that individuals from each of four countries (Japan, France, West Germany and the United Kingdom) travel to satisfy similar unmet needs (push factors: novelty, escape, prestige, enhancement of kinship relationships, and relaxation/hobbies). However, attractions for choosing a particular destination (pull factors) appear to differ among the countries studied. Based on the results of their study, Yuan and McDonald (1990) proposed that individuals from different countries have similar reasons to travel, but the level of importance attached to the factors differs across countries.

Jamrozy and Uysal (1994) examined push and pull factors that are likely to motivate five different German overseas travel groups (families, individuals traveling alone, couples, friendship, and organized tour groups). They found that overseas travelers from Germany, to a large extent, displayed variations in push motivations while traveling alone and in friendship groups, as opposed to when traveling as families, couples, and tour groups. Their findings further suggested that push and pull motivations play a crucial role in decision making with respect to sub-travel groups as well.

Crompton (1979a) also answered the call for a more thorough investigation into tourist motivations, identifying nine core motives through in-depth interviews with tourists. Seven of the motives identified were labeled as “sociopsychological,” and two as “cultural.” Findings suggest that some participants did not go to a certain destination for cultural insights or artifacts, rather, they went for sociopsychological reasons unrelated to any specific destination: “The destination served merely as a medium through which these motives could be satisfied” (Crompton 1979b, p. 415). Crompton’s results have been substantiated by other studies (Crandall 1980; Rubenstein 1980). In understanding tourist motivations, subsequent literature has documented a number of approaches that contribute to the way consumer motivations and needs are explored.

Based on Maslow’s hierarchy of needs theory, the Travel Career Ladder and Travel Career Patterns are two conceptual frameworks that emerged prominently in travel motivation research. Pearce and colleagues (Pearce 1993; Moscardo and Pearce 1986; Pearce and Caltabiano 1983) developed the Travel Career Ladder framework that describes tourist motivation as consisting of five different levels, organized into a hierarchy, or ladder, with the relaxation needs being at the lowest, followed by safety/security needs, relationships needs, self-esteem and development needs in that order, and finally, at the highest level, fulfillment needs. Broadly, the Travel Career Ladder framework proposes that with accumulated travel experience, people progress upwards through the levels of motivation. In doing so, some travelers ascend the hierarchy, whereas others

remain at a particular level, depending on contingency or limiting factors such as health or financial considerations. The Travel Career Ladder framework also highlights that people have multiple motives for seeking out holiday experiences, although one set of needs in the ladder levels may be dominant. Thus, travelers' motives influence what they seek from a destination and choose the destination based on how well they perceive it suits their personal, psychological, and motivational profile. The theory is partially supported by Gartner (1996) who considers that people may have more than one motive in participating in a particular type of tour.

Although previous empirical studies demonstrated that the Travel Career Ladder framework was an acceptable initial tool in understanding travel motivation (e.g., Lee 1998), the framework has been criticized for the explicit use of the term ladder as it resembled an analogy of a physical ladder with a focus on ascending the steps and being on only one step at a time. Pearce and his colleagues (Lee and Pearce 2002; Pearce and Lee 2005) modified the Travel Career Ladder framework by de-emphasizing the hierarchical elements and proposed the Travel Career Patterns approach in which it is the dynamic, multilevel motivational structure that is seen as critical in understanding travel motivation and the patterns of these motivations that reflect and define travel careers. Pearce and his colleagues empirically tested the Travel Career Patterns framework by conducting surveys in both Western and Eastern cultural contexts, generating similar motivation factors. They are, in their order of importance, (1) novelty, (2) escape/relax, (3) relationship (strengthen), (4) autonomy, (5) nature, (6) self-development (host-site involvement), (7) stimulation, (8) self-development (personal development), (9) relationship (security), (10) self-actualization, (11) isolation, (12) nostalgia, (13) romance, and (14) recognition. Findings show that within these 14 travel motivational factors, respondents at higher travel career levels place more emphasis on externally oriented motivation factors, such as self-development through seeking nature, while respondents at lower travel career levels focus more on internally oriented motivation factors such as romance. The findings indicated that novelty, escape/relaxation, and relationships are the most important and core motivation factors to all travelers, and that recognition, romance, and nostalgia are the least important factors. From these findings, Pearce and Lee (2005) proposed the Travel Career Patterns model, where travel motivations are conceptualized as having three layers. The most important motives (novelty, escape/relaxation, and enhancing relationships) are embedded in the core layer. The next layer, surrounding the core, includes the moderately important travel motives, which vary from inner-oriented travel motives (e.g., self-actualization) to externally oriented motives (e.g., seeking nature). The outer layer consists of common, relatively stable, and less important travel motives (e.g., isolation, social status).

Heterogeneity of Travel Motivations

While much of the travel motivation literature discusses motivations to travel for the entire market, it has been acknowledged since the early 1970s that motivations are different for different people. For example, Plog (1974) developed a tourist typology dividing tourists into two personality types: allocentric (active) and psychocentric (passive). Plog posits that motivations relate to the personality type. Since Plog's seminal work, a large number of segmentation studies have been published which investigate different motivation profiles amongst tourists.

Given the large number of segmentation studies using travel motivations as a segmentation base, we have conducted a review, similar to that of quality-of-life measures. Segmentation studies published between 2006 and 2010 in the three major international tourism research journals (Tourism Management, Journal of Travel Research, and Annals of Tourism Research) were included in the review. Table 17.2 provides a frequency count of the motivational variables that have been used across these studies.

Table 17.2 Use of motivational variables in segmentation studies (2006–2010)

Motivational variable	Percentage of occurrence
Authentic experience	85
Relaxation/rejuvenation	85
Escape routine	77
Family and friendship – building connections with others	69
Fun and entertainment	69
Knowledge improvement	69
Novelty	69
Excitement and adventure	54
Meet people/socialize	46
Nature	46
Tranquility/solitude	46
Exploration	38
Historical/heritage sites	31
Physical activity	31
Recognition	31
Curiosity	23
Meet others who enjoy the same thing	23
Safe environment	23
Sightsee	23
Climate	15
Friendly locals	15
Indulgence	15
Recommendation from a friend or relative	15
Value for money	15
Experiences for children	8
Health	8
Luxury accommodation	8
Visit attraction/attend a specific event	8

Of the thirteen motivational segmentation studies reviewed in this study, ten relate the concepts behind the segmentation to motivation theory, whereas three do not provide any theoretical justification for the use of motives as a segmentation base. Among those authors who provide justification for their use of motives as the segmentation base, the main reason for selecting them is that motives are believed to affect purchase decisions (Park and Yoon 2009). Motives are described as “underlying forces” that have the power to direct travel decisions (Beh and Bruyere 2007) and act as the starting point that “triggers the decision process” (Chang 2006, p. 1225). Foundational motivation theory studies including Crompton (1979a, b), Dann (1977), Iso-Ahola (1982, 1999), and Maslow (1962) are referred to in only a limited number of reviewed studies (Rittichainuwat 2008; Moreno Gil and Ritchie 2009; Mehmetoglu 2007; Beh and Bruyere 2007; Park and Yoon 2009). In most instances, authors address the reality of different motives and certain aspects of motivation theory (such as push and pull motives that play a specific role in determining travel decisions), acknowledge that different decisions are made for different reasons (Martin and del Bosque 2008), or identify that the motivation to travel occurs when different needs must be met (Beh and Bruyere 2007).

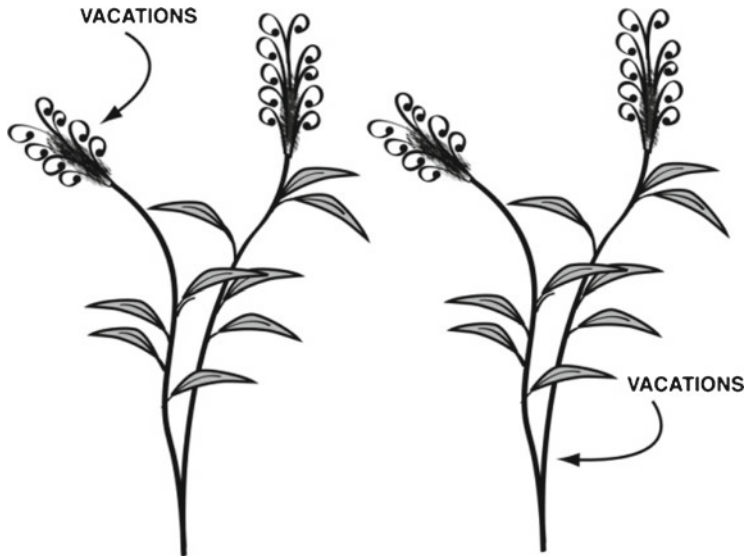


Fig. 17.1 Grevillea Model (Dolnicar et al. [accepted for publication](#))

Prior Attempts of Integrating the Concepts of Quality-of-Life and Tourism Motivations

Although there are several studies on quality-of-life and travel motivations, there are only a few studies that integrate the two concepts. For example, Hsu et al. (2007) emphasized the importance of understanding the motivation of senior travelers in the efforts to improve the quality-of-life for senior citizens through vacation activities. They proposed a theoretical model based on intense scrutiny of textual data collected through in-depth interviews. Their tourism motivations model consists of two main components: (1) external conditions which include societal progress, personal finance, time, and health, of which personal finance and time are mediated through family support and responsibility and (2) internal desires which include improving well-being, escaping routines, socializing, seeking knowledge, pride and patriotism, personal reward, and nostalgia.

Integrating Travel Motivations and Quality-of-Life in the Grevillea Model

Dolnicar et al. ([accepted for publication](#)) have recently proposed a Grevillea Model (illustrated in Fig. 17.1) of the importance of vacations for people's quality-of-life. They use the metaphor of the Grevillea, an Australian native shrub, because it comes in hundreds of varieties (symbolizing the large amount of difference in people with respect to the contribution vacations make to their quality-of-life). The core quality-of-life domains are symbolized by the branches and leaves of the shrub, which are fundamental to its survival. Domains which are not essential but have the potential to enhance people's quality-of-life are symbolized by the flowers of the Grevillea, which are known to be spectacular in shape and color. The Grevillea Model is in line with Maslow's hierarchy of needs theory and TCL framework, because it acknowledges that some needs (or domains) are more important than others, and is also in line with literature which

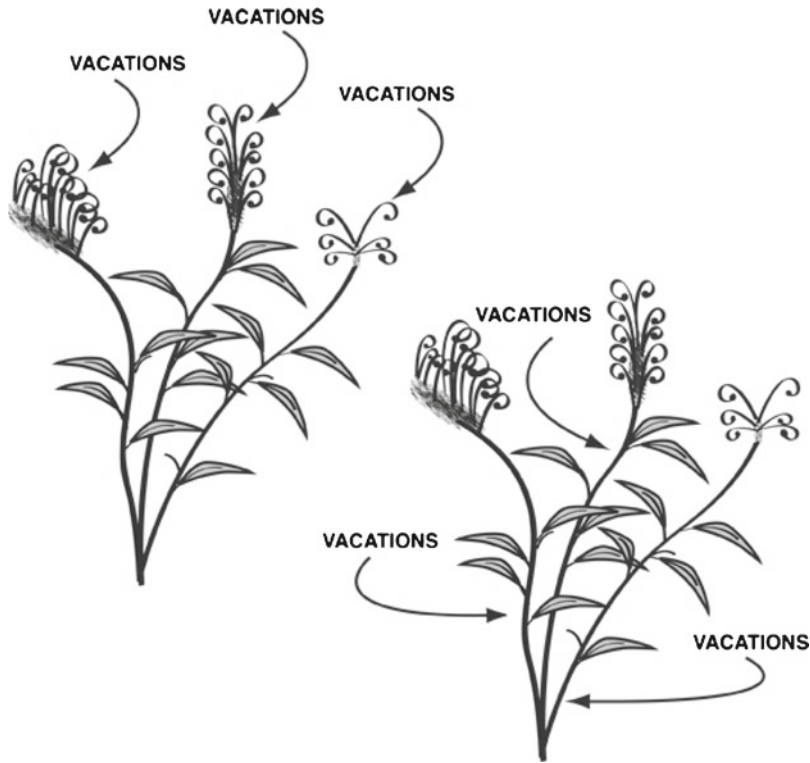


Fig. 17.2 Extended Grevillea Model

agrees that quality-of-life consists of a number of domains. However, the Grevillea Model differs from both these frameworks in that heterogeneity between people (and within people over a person's lifetime) are acknowledged.

We now present an extended Grevillea Model. The extended Grevillea Model is the first attempt at conceptually integrating quality-of-life and travel motivations while acknowledging heterogeneity among people, with respect to both the importance of different quality-of-life domains and their travel motivations. The model is depicted in Fig. 17.2.

The left-hand illustration represents people who perceive vacations as an enhancement domain of quality-of-life, illustrated by the flowers of the Grevillea. As can be seen in this picture, the flowers of the Grevillea are different, symbolizing that different people, all of whom see vacations as an enhancement domain, have different travel motives. This has direct implications for tourism marketing: First, people who view vacations as an enhancement domain may reduce their travel activity in times of crises but represent very attractive target segments when not confronted with difficulties. While these people have in common that they could be willing to sacrifice their vacations in tough times, they differ in their motivations for travel, so unique communication strategies will have to be developed to separately target segments who share similar travel motivations.

The right-hand picture represents people who see vacations as a core domain of their quality-of-life. Because, for this segment, travel is an integral part of their life, they are likely to be more reluctant to sacrifice vacations, even in times of crisis, making them a highly attractive market segment for tourism destinations and businesses. Yet, heterogeneity in travel motivations needs

to be acknowledged because (as depicted by the different shapes of the flowers) subgroups of this segment are driven to travel for different reasons. Communication messages need to reflect this heterogeneity.

Finally, as in the original Grevillea Model, the symbolism of the Grevillea also acknowledges that people change in the course of their lives and that domains that may be core to their quality-of-life in certain stages of their life move to become only enhancement domains or drop out of a person's list of quality-of-life domains completely, much like the different seasons that affect the flower: "Grevilleas mostly flower from late winter into spring, but there are a number of species which you will find adding color to the hot summer" (Greengold Garden Concepts 2006).

Conclusions

Quality-of-life and travel motivations are crucial concepts in understanding the drivers of tourism activity. Traditionally, while leisure and recreation is generally accepted to contribute to people's quality-of-life, vacations are ignored. In addition, heterogeneity between people with respect to their quality-of-life domains is rarely explicitly acknowledged. Finally, travel motivations, a heavily researched construct which is known to affect travel decisions in a major way, have to date not been integrated into the quality-of-life perspective. The Extended Grevillea Model brings quality-of-life and travel motivations together and acknowledges, for both these constructs, heterogeneity in the market as well as the existence of changes over time in people. As such, the model offers a new perspective on the role of both quality-of-life domains and travel motivations for travel decision making and provides conceptual guidance to tourism industry about strategic decisions relating to target market segments.

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Appendix

Review of quality-of-life test battery dimensions for healthy adults					
S.No.	Publication details	No. of domains	Domains	Leisure Vacation	
1	Cummins, R. A., McCabe, M. P., Romeo, Y., & Gullone, E. (1994). The comprehensive Quality of Life scale: Instrument development and psychometric evaluation on tertiary staff and students. <i>Educational and Psychological Measurement</i> , 54, 372–382.	7 domains	Material well-being, health, productivity, intimacy, safety, place in society, emotional well-being	No	No
2	Dazord, A., Gerin, P., & Boissel, J. P. (1994). Subjective Quality of Life assessment in therapeutic trials: Presentation of a new instrument in France (Subjective Quality of Life Profile: SQLP) and first results. In J. Orley & W. Kuyken (Eds.), <i>Measurement of Quality of Life in health care settings</i> . Berlin, Heidelberg, New York: Springer.	5 domains; 15 sub-domains	Functional life (motor function, psychological life, sensory function, sexual life, sleep, digestion, and pain), social life (specific relationships, social roles, interest), material life (income and housing), spiritual life (religious beliefs, faith and inner life), fifth unspecified domain (what is the most important thing in your current life?)	Yes	No
3	Dunbar, G. C., Stoker, M. J., Hodges, T. C., & Beaumont, G. (1992). The development of SBQOL – a unique scale for measuring quality of life. <i>British Journal of Medical Economics</i> , 2, 65–74.	10 domains; 28 sub-domains	Psychic well-being, physical well-being, social relationships, activities/hobbies/interests, mood, locus of control, sexual function, work/employment, religion, and finances	Yes	No
4	Gall, T., & Evans, D. R. (2000). Preretirement expectations and the Quality of Life of male retirees in later retirement. <i>Canadian Journal of Behavioural Science</i> , 32(3), 187–197.	5 domains; 15 sub-domains	General well-being (material well-being, physical well-being, personal growth), interpersonal relations (marital relations, parent-child relations, extended family relations, extra familial relations), organizational activity (altruistic behavior, political behavior), occupational activity (job characteristics, occupational relations, job satisfiers), leisure and recreational activity (creative/aesthetic behavior, sports activity, vacation behavior)	Yes	Yes
5	Ferrans, C. E., & Powers, M. J. (1985). Quality of Life index: Development and psychometric properties. <i>Advances in Nursing Science</i> , 8(1), 15–24.	16 sub-domains	Health care, physical health and functioning, marriage, family, friends, stress, standard of living, occupation, education, leisure, future retirement, peace of mind, personal faith, life goals, personal appearance, and self-acceptance	Yes	No
6	Flanagan, J. C. (1978). A research approach to improving our quality of life. <i>American Psychologist</i> , 33(2), 138–147.	5 domains	Physical and material well-being, relations with other people, social, community, and civic activities, personal development and fulfillment, recreation	Yes	Yes

7	Frisch, M. B. (1994). Quality of Life Inventory. National Computer systems, Product Number 02104, Minneapolis, MN.	16 domains	Love, work, health, goals & values, play, creativity, helping, friends, relatives, home, money, children, learning, neighborhood, community, self-esteem	No	No
8	Johnston, D. F. (1988). Toward a comprehensive "quality of life" index. <i>Social Indicators Research</i> , 20, 473-496.	9 sub-domains	Family stability, earnings and income, housing, health, employment, education, poverty, equality, public safety	No	No
9	Kreitler, S., & Kreitler, M. M. (2006). Multidimensional quality of life: A new measure of Quality of Life in adults. <i>Social Indicators Research</i> , 76(1), 5-33.	17 sub-domains	Functioning in the family, physical health, physical functioning, active living, sexuality, body image, cognitive functioning, work and profession, social functioning, positive emotions, negative emotions, meaningfulness in life, confusion and bewilderment, ability to cope, stress, self-image, living conditions	No	No
10	Lance, C. E., Mallard, A. G., & Michalos, A. C. (1995). Tests of the causal directions of global-life facet satisfaction relationships. <i>Social Indicators Research</i> , 34, 69-92.	11 domains	Health, finances, family relations, paid employment, friendships, housing, life partner, recreational activity, religion, transportation, and education	Yes	No
11	Lazim, M. A., & Osman, M. T. (2009). A new Malaysian Quality of Life index based on fuzzy sets and hierarchical needs. <i>Social Indicators Research</i> , 94(3), 499-508.	11 domains	Income and distribution, working life, transport and communications, health, education, housing, environment, family life, social participation, public safety, and culture and leisure	Yes	No
12	Lever, J. P. (2000). The development of an instrument to measure Quality of Life in Mexico city. <i>Social Indicators Research</i> , 50, 187-208.	19 sub-domains	Work, children, couple relationship, economic well-being, physical well-being, family, environment, sociability, close friends, social aspects, personal development, self-image, social surroundings, recreational activities, housework, losses (deaths), moral and religious dimensions, personal expression and creativity, personal knowledge	Yes	Yes
13	Neal, J. D., Sirgy, M. J., & Uysal, M. (2004). Measuring the effect of tourism services on travellers' quality of life: Further validation. <i>Social Indicators Research</i> , 69, 243-277.	Leisure and non-leisure domains	Trip experience, leisure, job, family situation, personal health, relationships with people, community and neighborhood, and standard of living and financial situation	Yes	Yes
14	Olson, D. H., & Barnes, H. L. (1992). Quality of Life Scale. In D. H. Olson, H. I. McCubbin, H. Barnes, A. Larsen, M. Muxen, & M. Wilson (Eds.), <i>Family Inventories</i> (3rd ed.; pp. 55-67). Minneapolis, MN: Life Innovations.	12 domains	Marriage and family life, friends, extended family, health, home, education, time, religion, employment, mass media, financial well-being, neighborhood/community	No	No

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Chapter 18

Relational Tourism: Observations on Families and Travel

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Introduction

As viewed through a family dynamics and systems lens, travel and tourism is, in effect, *relational tourism*, and pivots around interaction and transaction among family members. Moreover, it is likely a family is interacting with other families in many travel and tourism contexts, thereby expanding relational tourism to interaction and transaction between different families. Our discussion explores relational tourism by invoking primary conceptual and theoretical standpoints found in the literature in human development and family science, thereby drawing a general roadmap for individuals interested in sharpening the understanding of certain relational processes inherent in the tourism experience. Our assumption is that this understanding provides insight to how individual and family quality-of-life is potentially changed, either for better or for worse. We limit our focus in this chapter by providing observations centered on three questions: What is the family relational leisure lifecycle experience? Within that lifecycle, which family dynamics processes are activated? What do these lifecycle experiences and family dynamics processes suggest for *relational tourism* and quality of family life? Throughout our discussion, we invoke concepts and findings from several theoretical perspectives on individuals and families. These frameworks are family contexts and systems, symbolic interaction, and social exchange. In effect, we tell the relational tourism story in two ways, one narrating what goes on when families travel and the other narrating the application of social and behavioral theories to family travel.

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A Lifecycle Narrative of Family Travel and Leisure Experiences

It is acknowledged by most scholars who study families and time use that an actual activity or event is preceded by and followed by any number of family viewpoints, decisions, communications, and negotiations (Orthner et al. 1994). In this section of our observations, we hope to expand the nuances of this time use lifecycle. Our beginning foray into this lifecycle discussion organizes our thinking according to five phases, not necessarily mutually exclusive and not necessarily linear. These big boxes are *Formal organization opportunities and contexts*, *Family advantage and opportunities*, *Family action, deliberation, and planning*, *Reflection, reorganization, and reminiscence*, and *Over the horizon planning* (see Table 18.1 and Fig. 18.1). We realize these are cumbersome catchments and require further refining. But for now, they will serve as general ways to give form and substance to family travel and leisure experiences from a lifecycle perspective and a perspective that highlights family dynamics.

Formal Organization Opportunities and Contexts

Travel and tourism opportunities are vast, certainly for families with resources. In our schema, the largest and broadest context (that which surrounds and ultimately permeates individual and family life) that structurally is found outside of families themselves is that constructed by tourism and travel businesses and entrepreneurs, those who, in effect, devise the opportunity menu. This includes tour operators, resorts, parks and recreation, the transportation industry, small businesses that cater to on-site tourist needs, and so on. While the list is not endless, it clearly is expansive. Families ultimately decide where to enter this travel and tourism megasystem, but the megasystem itself displays what can be chosen. In this regard, these formal organizations can make it easy or difficult for families to engage in affordable or expensive, safe or risky, and even perhaps more or less enjoyable activities. The role formal organizations have in our schema is significant because they can intentionally influence individual and family quality-of-life, that is, be mindful of families as they plan and execute their activities or be solely profit oriented. In another context, we have argued that a primary goal of formal organizations should be to enhance informal networks and relationships, such as those families comprise (Mancini et al. 2005). To explain further, one way to think about the tourism industry and the businesses that comprise it is as a formal organization that has an obligation to assist and serve informal networks of family members, friends, neighbors, and work associates. Consequently, these organizations should be intentional about promoting relational tourism, that is, structuring family opportunities that provide them time for interaction and transaction within the family and between their family and other families who are involved in the same travel and tourism experiences. A second element of our schema also pertains to opportunities, but is centered on family circumstances and situations.

Family Advantage and Opportunities

From a human development and family science perspective, families cannot be viewed in homogenized ways but rather their substantial variations and diversities must be accounted for. This includes most particularly the disparities many families face geographically, economically, and socially. Whether families participate in travel and tourism opportunities, that is, take the necessary steps to actually find themselves in the midst of an experience, is informed by concrete and not so concrete factors. For example, having time is a resource, and actually possessing little of it

Table 18.1 The relational tourism lifecycle: contexts, interactions, and transactions

Formal organization opportunities and contexts	Family advantage and opportunities	Family action, deliberation, and planning	Family participation and execution	Reflection, reorganization, and reminiscence	Over the horizon planning: next steps
The range of choices families may have provided to them by the tourism industry	Abilities families may have to actually participate in certain tourism activities	Weighing options for family travel and tourism and accommodating individual family members	Acting on the plan and accommodating individual travel and tourism behaviors of family members	Attaching meaning, importance, and satisfaction to the travel experience	Starting the conversation on what the next travel and tourism experience might contain
Aside from choices, the influence the industry can have on families, either their aspirations or their behaviors	Opportunities determined by available time and available resources	Coming to terms with competing needs and wants, making decisions, and finalizing a concrete scheme	Coming to terms with anticipated experiences and actual experiences	Making sense of the experience, recalling memorable events and interactions, and recalibrating future expectations	Placing new thinking in the context of past experiences, determining what should be enhanced and what should be avoided

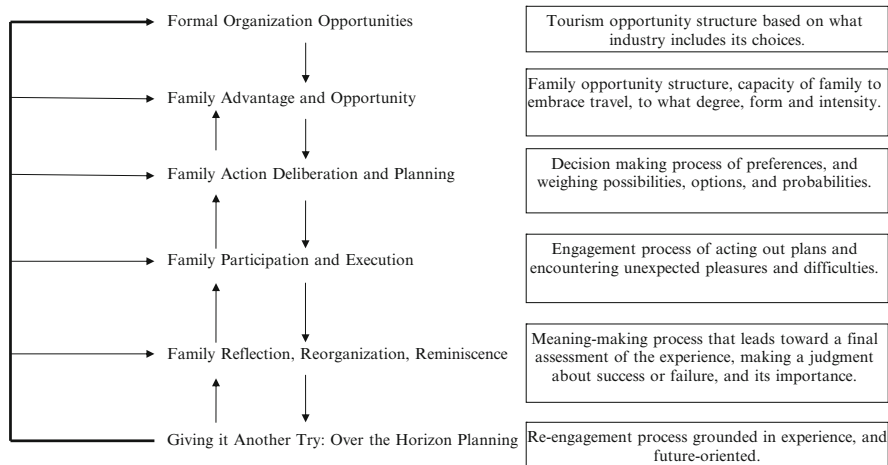


Fig. 18.1 Relational tourism: interplay of structural and process elements. Note: There are two processes reflected in this figure, the one showing how each element of the relational tourism cycle informs another in a linear way and the other showing these elements intersecting as relational tourism unfolds

constrains what can be chosen for travel and tourism. Within this category of time is a set of individual and family decisions, as well as values, that allow a family to travel and to tour and under what conditions and to what lengths. For example, a family's identity (how they view themselves as a group and their comfort with that viewpoint) will play into how they use non-work or nonschool time. Some families are all about day trips, whereas others load their travel and tourism experience into a longer and more intense window of time. In effect, our schema suggests we allow for particular orientations families may have about travel and tourism. We have already mentioned having time as a resource, but there are any number of other resources important for understanding these family experiences from a lifecycle view. As an example, another very concrete factor is family economic ability. Many travel and tourism choices are in fact not choices because they are unattainable in the absence of substantial amounts of money. So while families may have conversations about any number of places they would like to go, choices are constrained when economic costs are tallied. From a social action and societal ethics perspectives, then it becomes important for the well-being of the society to make available attractive and enjoyable and meaningful travel and tourism opportunities for low-resource families. Public parks, local historic and cultural sites, and natural recreation areas in rural and urban areas become important uses of family time. Moreover, available and affordable transportation to these places is equally important. Though we may possess lofty ideas and concepts about the merits of how time is used by families, if we do not account for the pragmatic in our schema, we have drawn a picture with significant missing shapes and colors. These many aspects of family advantage and opportunities have direct bearings on how families actually plan what they will do together. This ultimately determines when first-rate travel and tourism is solely for an economic elite.

Family Action, Deliberation, and Planning

At a point, families will actually engage in positioning themselves for nonwork activities, in some arena of recreation, leisure, travel, and tourism. Or they will abandon the discussion or

delay it for a future time. Family decision-making is a complex process and can bring out the best or the worst in family members. We assume it is unlikely for families to behave any differently in a travel or tourism context than they would any other time of the year, mainly because families develop stock methods of making-decisions, of valuing the views of different family members, and of deciding who will ultimately decide. At a point in this part of the lifecycle, monetary and time resources have to be reconciled with family aspirations. It is really a second of many decisions in this phase, the first being whether the family will even engage in travel or tourism. The second decision really is about the intensity of that participation and the associated costs. The number of different voices in these decisions may be low because usually whoever in the family has most say over resources has already spoken. That same person may be the one *who decides* who decides in other considerations that have to be made by the family. Actual planning takes many twists and turns, and, in the process, there are likely to be disappointments and triumphs. During this phase, the form and substance of travel and tourism takes shape, and before long, the experience can be visualized (including getting to the “there” and the activities that await families). To invoke an oft-used phrase, this process is “fraught with danger.” In the mix of this planning is the development of an equation of many parts that has a result or product (an answer). Along this planning road, the comparative power of family members again becomes evident, the practical considerations become clear, old patterns of family interaction (both productive and destructive) re-emerge, and a range of compromises occur. But at a point, there is a plan, that is, either endorsed by or agreed to by family members. Some family members may be excited about what will happen next, whereas other may be resigned.

Family Participation and Execution

With anticipation running high, not to mention fatigue that accompanies planning what may be a complex family event, families eventually find themselves in the actual travel and tourism experience. They may be camping in the deep woods, or at a well-manicured resort, or on a car trip covering 10 cities in 8 days. In any case, the plan is now being executed, and family members are interacting, mainly with each other both night and day, and probably with other families (though we recognize some families are hesitant to interact with others they deem strangers). They are also likely interacting with the tourism and travel industry and its institutions. Therefore, interaction and transaction occur at multiple levels and require family members to communicate, negotiate, dialogue, and compromise. The actual vacation experience is what all have been waiting for, not entirely different from Christians anticipating Christmas morning. The experience is considered the culmination of the planning, though at second glance it really is most productive for reflection and reminiscence (certainly those are the long-term consequences of vacationing). With careful reflection and sharing, the process of planning and execution can increase family cohesion, better define family roles, and help members explore various facets of their relationships. For example, as children mature, adults can allocate various and increasing responsibilities to them to enhance participation as well as nurture them for the world of making grown-up decisions. Within this experience phase, family members figure how to maximize the travel and tourism experience to their advantage; it sometimes goes well and at other times goes horribly wrong. Quite a number of years ago, we wrote about both cohesion and dissonance as results of family leisure experiences (Orthner and Mancini 1980). It is all too easy to have a Pollyanna view of spending time together, especially if we do not consider the family dynamics that have to go well during the experience, not to mention that families take into the vacation experience all that they have accumulated throughout the many non-vacation weeks.

Family Leisure Experiences Post Mortem: Reflection, Reorganization, and Reminiscence

While the actual travel experience will end, its aftermath lingers and sometimes lingers for a lifetime. In the short run, family members hash over the travel experience, some anxious to repeat the experience and other just anxious (perhaps anticipating having to repeat the experience). Because family members bring to the travel experience their personal expectations and during the experience actually have different experiences (for example, adult responsibilities may change very little, especially if there are younger children in the family), the sense they make of these family activities will differ. It is fair to say there is no such thing as a family vacation but rather a collection of family vacations. Reflections can take the form of reliving particular activities, or may be more general as to feeling positive that everyone got along and had an opportunity to experience one another in an out-of-the-ordinary manner. Reflections may also have a “what if” tone, meaning thoughts about what could have been had the travel been planned differently or had particular family members been more cooperative on the trip or had they been able to vacation longer. The relational aspects of the post mortem also come into play. These reflections are about “self” and about “others” and about the relationship between them. Family members are the primary contexts in which we experience spending time together in travel and tourism.

Giving It Another Try: Over the Horizon Planning

Therefore in the mix of considering, experiencing, and pondering the travel and tourism experience comes a decision to plan for the next family travel and tourism experience. Repeating the relational tourism cycle can begin at various points even while the current experience is occurring. However, for certain, once family members take a deep breath and reflect on the travel experience, they either dismiss or embrace the idea of the next family experience. Families that get on well typically are on board for the next trip, even as they are savoring the most current set of travel and tourism experiences. Oddly enough, very often families who did not do so well also are on board for the next set of experiences. This is so because there is an expectation that families vacation together, and many family members do have expectations that things could go better the next time.

Intersections of the Relational Tourism Elements

Relational tourism is composed of both structural and process elements (see Fig. 18.1). Because families as social systems have a very long career, that is, tend to stay connected for decades and therefore interact and transact for long periods of time, the process of relational becomes anything but linear. Though we have discussed the five elements of relational tourism as if all were linear, we also recognize that with experience, families incorporate how they spend time together into their ongoing ways of interacting (in effect, incorporate into each of their family systems). If we begin with “giving it another try,” we see that element is reliant on all other elements as its content (arrows directing upward to each previous element). In addition, several other relational tourism elements are integrally related. For example, “reflection, reorganization, and reminiscence” occurs because “participation and execution” is its context and provides the raw materials. The nature of “participation and execution” is largely determined by what has occurred during “deliberation and planning” and so on. Therefore, to fully understand any one element of relational tourism, each other element serves as context, that is, informs what is known.

Theoretical Frameworks and Relational Tourism

So far we have provided an overview of phases of relational tourism as it progresses from opportunity to planning to participation to remembering to next steps. While we have tried to discuss variety throughout, we recognize that because of the enormous diversity of families, as well as diversity in travel and tourism opportunities, we have glossed over many important nuances. But the general patterns and forms have been explicated. What we now add to our discussion is information on theories of families that have application to families, travel, and tourism (see Orthner and Mancini 1991 for an earlier example of applying family theories to leisure experiences). Also note that we select only parts of each theory to present as important for understanding relational tourism; there are substantial and complex treatises on each of them discussed elsewhere (for example, see Mancini and Bowen 2012, with regard to examining families within community contexts).

Family and Social Exchange Theory

Exchange theory is a useful framework for examining the relationship between family relationships and family travel (Burgess and Huston 1979) and originally is developed from economics, psychology, and sociology. Rewards, costs, and resources are key elements when looking through an exchange lens. Rewards are what a person gains from social relationships, including those with family members, in other words, benefits. Positive results from social relationships may be described as gratifications or satisfactions. Resources are exchanged in relationships, in effect, something that one person gains from another; cost essentially means that, when all is said and done, a relationship or an interaction took more from a person than gave him or her. Comparison level is another important term from a social exchange perspective, meaning that a person examines a particular relationship and the experiences that surround that relationship with regard to other relationships and their related experiences. If a family experience compares favorably with other family experiences, with normal everyday family life experiences, or with relationships and experiences with others, then one determines that relationship positively. Comparison level and comparison level for alternatives (that is, which relationships and their rewards outstrip other relationships) partially explain why some relationships last and why some events related to those experiences are repeated (such as families spending time together, especially when family members have other choices). The theory contends that our behavior is based on the motivation to maximize our actions that increase personal rewards and minimize personal costs. Patterns of fairness, reciprocity, decision-making, and control are addressed within the exchange framework. From an exchange perspective, any conflict associated with discussing and participating in family travel is not necessarily negative but represents opportunities to work out differences (recognizing that differences are not always worked out). With family travel, all ideas and activities will not reap the greatest benefit for all members. Family members will strive to make their voice heard in order to maximize the experiences they want to have while minimizing those they would rather avoid. Exchange theory focuses on the processes of how relationships are experienced and developed. This approach has a great deal to say about closeness in relationships and how family members interact. People strive to minimize costs and maximize rewards and then base the likelihood of developing a relationship with someone on the perceived possible outcomes. When these outcomes are perceived to be greater, we may disclose more and develop a closer relationship with that person. Exchange theory states that relationships are repeatedly being negotiated and that the strength of the relationship comes from each person's ability to negotiate reasonable exchanges on an ongoing basis (Orthner and Mancini 1991). Therefore, from a family and social

exchange approach, relational tourism can be analyzed by focusing on rewards and costs, and on how those rewards and costs compare with other relationships and their associated activities. It is important to note that the rewards and costs occur at multiple levels: from time and money to personal gains and losses. Therefore, one must be aware of intangible losses and gains (meaning-making, emotions, relational quality) along with tangible ones (money, location). To extend the discussion to travel and tourism, how willing family members are to repeat leisure activities has something to do with their estimate of those personal costs and rewards.

Symbolic Interaction Theory

The symbolic interaction framework is based on two primary premises. First, that people act toward or make interpretations about things based on the meanings those things have for them, and second, that meanings are realized out of interaction between the individual and their environment, including other people (LaRossa and Reitzes 1993). The meaning that family travel has for the family system, as well as the individual members of the family, is created through their interactions with other people and their environments. The meaning could be different depending on the family's geographic location, their economic situation, their past experiences, and the people with whom they choose to associate. The meaning could change over time as the children in the family grow older and start to associate more with those outside the home environment. For example, parents with small children have much greater decision-making power as they rely heavily on their values and traditions in an attempt to shape the meaning and experience that will establish a greater sense of family cohesion. As children grow into their teens and have interacted more with and are more influenced by their friends, parents have less decision-making power and must negotiate the terms of the shared experience if greater bonding, cohesion, and meaning are to be generated with the intention of improved quality-of-life.

The symbolic interaction framework considers how people create meaning during social interaction. Whatever the family's life stage, the interaction between family members is where negotiations and planning happen and where meanings are shaped and defined. It is our interactional context that helps us create meaning. Due to the role of the family, each family member would have similar yet different definitions and meanings on what travel should include.

A key idea in symbolic interaction theory is that people act the way they do because of how they define their experiences. To understand how families are differentially involved in family travel experiences, the range of specific roles that family members play could be explored. Family members who place higher value on family travel than other activities would most likely find greater benefit and meaning. Negotiating the conflict of where to go and what to do, family members' attitudes and actions while on the vacation, and the experiences they choose to remember, all contribute to the meaning generated through their interactions. Do family roles and relationships change for family travel? What is the process by which family members arrive at a similar set of goals, values, and norms when it comes to family travel? It is through social interaction that individuals apply mutual symbols and create the specific meanings of self, others, and situations. Family travel is a key activity that helps us understand how meaning is created and how quality-of-life is affected.

Family and Social Systems Theory

A very general family systems notion is that what happens to one family member impacts others in the family; similarly, what happens within a relationship in the family will affect other

relationships in the family (Goldenberg and Goldenberg 2007). As one example, the number of days off a husband or wife may have from their employment, the amount of money the family earns, and when school breaks occur all impact family decisions on when the family will travel, where they will go, and what they will do. As a second example, how well siblings in a family interact will affect how each of them interact with one or more parents in the family.

There are several elements that explain family system functioning. For example, family bonding consists of a balance between cohesion (sticking together) and adaptability (comfort with the give and take) between family members. Cohesion is a balance between enmeshment (limited individual autonomy and excessive family bonding) and disengagement (high individual autonomy and low family bonding). Family bonding encourages mutuality of interests while at the same time providing a degree of individual autonomy. Adaptability looks for a balance between rigid adaptation (alternative roles and patterns of behavior are forbidden) and chaotic patterns (indicating a high degree of disorganization and perhaps conflict). Systems thinking encourages us to consider families as dynamic and holistic (meaning that parts of family life are interconnected and that change in some areas influence stability in other areas). To look at families dynamically from a systems framework means that connections and interdependence are accounted for. In family systems, history must also be recognized. This history pertains to how family members previously have cooperated, bonded, and found each other's company satisfying. Like all systems, families develop patterns of interacting and transacting. These patterns not only govern what they do each day throughout the year but also govern what occurs during leisure, travel, and tourism activities. Above all else, a family systems lens encourages us to view families as a whole rather than to only look at them as a collection of individual members.

A Note on Family Contexts

In the family science discipline a premium is placed on understanding the multiple contexts that surround individuals and their families. Boszormenyi-Nagy and Krasner (1986) remind us that "context is generated by interconnectivity," which is "inherent in the process of vital give and take between significantly interconnected partners" (p. 9). They further assert that this sense of context generated through mutual interaction also has temporal dimensions. Human contexts are linked to events in the past and happenings in the present, which are invariably connected to the future. The family leisure narrative is a fitting example of interconnectivity over time. It is important to understand that context is partially defined by the nature and quality of relationships that exist between people. Within a family, "the mutuality of commitment and the reciprocal accountability" develops a positive context for the members of that family (Boszormenyi-Nagy and Krasner 1986, p. 14). Whether as an individual, a family system, or a community, quality-of-life occurs within constructed contexts of relationships. These contexts are variable in what it offers its participants and further differ in meaning based on the cultural and sociological factors that form the backdrop for these relational contexts.

Relational Tourism and the Quality of Family Life

Thus far, we have painted a portrait focused on descriptions of relational tourism in a lifecycle framework and have woven in that portrait aspects of family dynamics. We then followed that discussion by invoking a set of general theories found in family science that have application to understanding families, travel, and tourism. These theories have relevance because they speak to how family members interact and transact.

Humans spend their lives in social settings, most intimately involving family members, first by birth and then by law. In this chapter, we have focused attention on the family as an example of relational tourism, knowing that there are variations on this theme. For example, we could have written something similarly had the focus been on friend relations. The essential and cross-cutting point is that the human condition is a social condition and as such requires that how time is used is placed within a relational frame. Within this relational framing of the travel and tourism experience is a primary result that we have alluded to, that is, meaning. Humans also continually make sense of their experiences and with whom they have the experience, and from that comes *meaning*. This meaning may have important consequences for how a person views self and for how intently involved he or she may desire to become with others. Importance is another phrasing and the value attached (the importance) to how time is spent with others. Quality-of-life then is partially attached to the meaning individuals and families attach to how time is spent and whether, at the end of the day, individuals and families have a sense of coherence and bonding, or have a sense of despair and disconnection.

Our portrayal of relational tourism across five elements also provides a template for how relational tourism can go quite well or detract from quality-of-life and in particular quality of family life. Though it is tempting to do so, it is important to recognize that time spent with family is not, by definition, positive, nor may be the process of planning or of recollection. Each stage poses gains and threats that could be created, maintained within the system, or induced by external factors. This is true as every aspect of planning, executing, and experiencing the tourism experience involves interaction of multiple people varying in their capacities to respond to each other. Every stage of the relational tourism lifecycle is ripe with opportunities to enhance or detract from the family experience. As mentioned before, these stages are not mutually exclusive or linear. However, the various contexts and transactions predict a certain sense of mutual reciprocity. Some of those predictable or anticipated patterns are now explained.

In the formal organization opportunities and contexts, external systems define and control the options of tourism, in which the family's capacity to choose is dependent on factors that are sometimes beyond their control. For example, financial resources become a primary concern in this phase. Additionally, tourism organizations often target various areas or even populations. Depending on the formal marketing strategies, all options may not be distributed equally throughout the system. Formal organizations in the business of tourism are of necessity far more interested in profit-making mechanisms than primarily promoting quality-of-life through a relational lens as advocated in this chapter. Therefore, while several opportunities provided by this sector increases possibilities of relational tourism, there is no guarantee to the process of meaning-making.

Family advantage and opportunities highlight the role of various social markers like income status, social status, available resources, and geographical location of a family. Underlying this stage is the actual agency of the family to understand tourism experiences as positively contributing to family life and quality-of-life. Families may choose to spend time otherwise. For example, if the family is highly disengaged, as explained by the family and social systems theory, it is unlikely that they will take advantage of opportunities presented by formal organizations. In this context, a family's quality-of-life continues to be neglected despite the presence of accessible options. At other times, conflict may arise about which opportunities to engage in vs. other wishes of the various family members. This conflict can occur due to mismatch of desires as well as resources, therefore potentially decreasing the quality of time spent together and the bonding that could occur.

A lot of interaction occurs during the family action, deliberation, and planning stage. Family patterns clearly emerge here displaying various coalitions, rigidity or flexibility of roles, and provide a hot context for eruptions or enhancements of relationships. For example, older adolescents in the family may not appreciate "excessive rules" laid out by the parents. Parents may

actively disqualify the youth's suggestions, thereby positioning the family in a dance of conflict rather than resulting in productive dialogue and decision-making. There is every opportunity for family cohesion to be a casualty.

Family participation and execution is also rich with opportunities for positive engagement or negative collisions. For example, teenagers unhappy with the parent's decision on how to spend the evening will determine their level of enthusiasm in participating in the tourism experience. Spousal arguments about the children can further dampen the context for negative outcomes. However, a family's willingness to be together despite the disagreements can turn the whole experience around, thereby negating the accumulation from previous stages. Again, these stages are not mutually exclusive. Because much of this is dependent on human interaction, unimaginable possibilities of interactions can turn something entirely sour into a sweet memory and vice versa.

The stage of reflection, reorganization, and reminiscence is one where the family explores the experience of relational tourism and determines the meaning of their time together. While making sense of the experience and recalling satisfying times occur often, most families do not dedicate specific time to do this. In corporate teams and community-organizing settings, members of a cohort are often brought together for debriefing, sharing, and mutually understanding personal experiences in the context of the larger group. This formalized, yet very powerful process of mutual affirmation enhances the team experience, trust, and longevity of the group structure. While such activities may appear sanitized and too artificial for family settings, it is a useful lens families could adopt to make sense of their experiences as a unit and how it impacted each of the individuals. This stage is often overlooked or underperformed in most families.

As families end one tourism experience, they often are engaged in considering the next experience (over the horizon planning and next steps). They may have decided that certain activities with certain family members should never be repeated or may be convinced that each year, they should attempt to replicate the positive experience of vacationing together. Because a relational tourism experience is not the same for each family member, even though all appear to be part of the same experience, there can be very divergent conclusions. And these divergent conclusions no doubt had their roots very early in the relational tourism life cycle. Alas, much of the relational tourism experience depends on family history, on family cohesion, on individual expectations, and on who or what may have been competing with family travel and tourism. Within each of the relational tourism elements, there can be both positive and negative results, whether they are because of poor destination choices or due to poor companionship among family members. In any case, family interaction is effected and, in turn, affects individuals and their experience.

Ventegodt et al. (2003, p. 1031) assert that "quality of life means a good life." The quality of family life means that all things considered, family members agree more than disagree, support each other more than undermine each other, look forward to spending time together rather than having a sense of dread. Meaning is generated through all these in forms of specific memories, incidences, and reminders of significant events. The context that travel and tourism provides for families and the relationships they have with one another is significant and can be among the memories that withstand the test of time.

Implications for New Inquiries

We conclude our exploration of relational tourism by suggesting implications for new inquiries into the complexities of family life and relationships within the contexts of vacationing, leisure, and tourism. Throughout this chapter, we have invoked the term *meaning*, suggesting that individuals attach significance and importance to what they do and, as a result, define the nature of

their family. This is more of an assumption than an artifact of relational tourism that has been empirically studied. A primary research question is how relational tourism aids how a family defines who they are as a group, in effect, adding to their group identity as people who are connected by blood or by marriage. This research question could begin with an analysis of individual family members' views on the family spending time together, including their respective expectations, feelings and beliefs, and behaviors. We have also discussed the family control and power issue phrased as, "who decides who decides." The significance of this phrase is due to family realities where there is a family member who primarily determines who has what say in the family, or if anyone has much say over travel and tourism decisions. It is likely the crucible of the relational tourism life cycle reflects the entirety of how decisions are made in a particular family and how productive those decisions are for family members and for relationships between them. A more particular research question in this area involves the matter of fairness and whether family members sense that family interactions and transactions are fair or unjust. If decisions are marked by incivility, it may be that the entire relational tourism life cycle becomes poisoned. We have also discussed the potential lasting dividends of family members spending time together, yet the nuances of how these dividends are paid remain unclear. For example, what leads memories to linger for a lifetime? Are there particular parts of the relational tourism life cycle relatively more significant for lingering memories? In a sense, this question is also part of the larger meaning-making potential that relational tourism provides. If the stages we have proposed are reasonably accurate markers of the process, we wonder how bonding and meaning-making are differentially enhanced. In a very broad sense, all of our suggestions for new inquiries center around, at the end of the day, what it is that increases family cohesion and enhances a family's quality-of-life and at the same time, mitigates conflict and dissonance. As viewed through a family dynamics and systems lens, travel and tourism is, in effect, *relational tourism* and pivots around interaction and transaction among family members. Analyses of families, travel, and tourism open a window for understanding the dynamics of family life that transcend how families interact and behave solely while in a leisure context.

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Chapter 19

Impacts of the Internet on Travel Satisfaction and Overall Life Satisfaction

Soo Hyun Jun, Heather J. Hartwell, and Dimitrios Buhalis

Introduction

Travel experiences are composed of a variety of physical, social, and cognitive activities which potentially influence a traveler's sense of well-being and/or perceived quality-of-life (QOL) (Wei and Milman 2002). Travel motivation studies have found various travel needs such as emotion/sensory, novelty, fantasy, social interaction, and self-development (Goeldner and Ritchie 2006; Pearce 1992). These requirements correspond closely with Maslow's hierarchy of needs (Maslow 1970) which discuss human's deficiency needs for life such as physiological, safety, relationship, self-esteem, and fulfillment needs. It is obvious that people take a pleasure trip to satisfy those needs. Even a business trip can contribute to QOL when a business traveler feels that the trip contributes to his/her self-esteem, health, or learning. Thus, travel experiences can contribute to overall life satisfaction. Despite the potential contribution, few studies have examined effects of travel experience on overall sense of well-being and/or QOL. This chapter, therefore, discusses the relationship between travel experience and overall sense of well-being and/or QOL and the impacts of technology – specifically the Internet – on the relationship.

Tourism and technology are inextricably linked (Goeldner and Ritchie 2006): technology has been actively utilized by the tourism industry and the technological development has revolutionized the way in which people travel. For example, trains, automobiles, and airplanes have enhanced easy access to destinations, reduced travel time and cost, and eventually encouraged people to travel worldwide. While these technologies mostly contribute to travelers' physical

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experiences, the Internet contributes to communication and commercial transactions between suppliers and travelers. At the beginning of the Internet era, the World Wide Web mainly played a role in enhancing the quality of a travelers' planning experience. After the emergence of Web 2.0 applications and particularly user generated contents (UGCs), the role of the Internet including social media has expanded to a social platform in which travelers share their questions, motivations and planning processes, socialize with other travelers, create/gather/fortify/share travel information, and support/remonstrate with travel-related service providers.

The purpose of this chapter is to discuss the impacts of recent technological developments, specifically the Internet, on travel satisfaction and, ultimately, the overall sense of well-being and QOL. This chapter explores concepts of overall sense of well-being and QOL and suggests overall life satisfaction as an operationalized dependent variable to measure an individual's sense of well-being and QOL. It also discusses measurement issues related to the quantity of affect which has been dominated as a major independent variable of well-being and QOL, and it suggests an alternative independent variable, satisfaction in need constructs. Two conceptual models are proposed based on the Internet roles: when the Internet is considered as a tool for information search and purchase in advance; and when the Internet is considered as a social platform where individuals share travel information after a trip, communicate, and socialize with others. The proposed models will help understand the relationships between travel satisfaction and overall life satisfaction and the evolving roles of the Internet on these relationships.

Overall Sense of Well-Being, QOL, and Overall Life Satisfaction

It is certain that overall sense of well-being and QOL are the goal of human activity (Bradburn 1969). Aristotle interpreted *eudaimonia* as "well-being" which was more than pleasurable feelings and believed as a reason for human actions (Bradburn 1969; Ross 1949). Questions, such as what makes people happy (or satisfied with life) and what makes people behave to seek a sense of well-being or the increased QOL, have been studied throughout history; however, both sense of well-being and QOL are still perceived as controversial topics in research. One of the main concerns is that the terms, overall sense of well-being and QOL, are not clearly defined and often used interchangeably with little consistency in definition or reliability of understanding. This section first explores concepts of overall sense of well-being and QOL and suggests overall life satisfaction as a measurable variable of the constructs.

Overall Sense of Well-Being and QOL

Well-being is an abstract and nebulous term positioning itself within the QOL paradigm as subjective well-being (SWB), rather than as objective life circumstances. It is an individual feeling of contentment and happiness. Researchers, who view well-being as interchangeable with QOL, sometimes differentiate between well-being – which may incorporate objective conditions – and subjective well-being, which is well-being as defined, or assessed, by individuals themselves and which may include subjective response to objective conditions. Well-being as described by the World Health Organization (WHO) in its constitution (2006) denotes "health as a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity" (WHO 2006).

Social indicators have been developed to assess the QOL of the general population of cities, regions, or nations, while social and psychological indicators have been developed to assess the

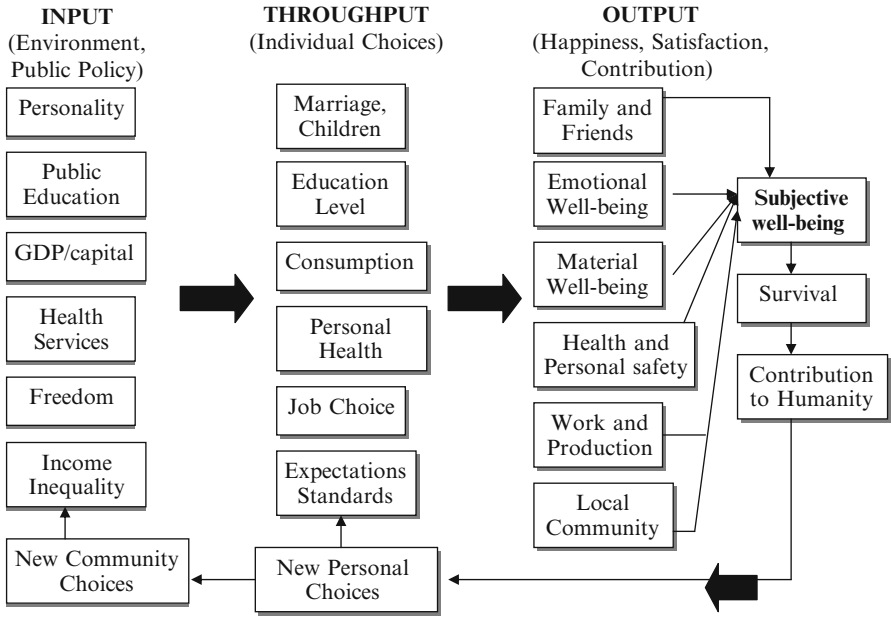


Fig. 19.1 Systems theory structure of quality-of-life (Source: Hagerty et al. 2001)

QOL of individuals or groups of individuals with common characteristics. This approach would argue that QOL is firmly embedded within objective rationalization which would make it distinct to the subjective feeling of well-being. It is acknowledged that this term is even more ambiguous and hard to define, but for the sake of completeness and ease of understanding and for the purpose of this chapter, we will use the benchmark of individual happiness agreeing that as such this does not fit neatly into any one theoretical model. Considering a systems theory structure of quality-of-life concepts and causes, as presented in Fig. 19.1, SWB is placed firmly within the output domain of happiness, satisfaction, survival, and contribution to humanity.

Overall Life Satisfaction as a Dependent Variable

Within the field of happiness economics, where the concept of subjective well-being is defined as life satisfaction, it can be both uni- or multidimensional. From an economic standpoint, subjective well-being can be defined and measured as both satisfaction with life in general (unidimensional) and satisfaction with different aspects, or domains, of life (multidimensional) (Galloway 2006). Evidence from psychology studies suggests that ratings of life satisfaction/dissatisfaction are a reasonably reliable indicator of how people feel about their lives, providing a good sense of individuals’ subjective well-being (Diener 1984). Examples of well-being definitions are given in Table 19.1.

Life satisfaction and job satisfaction have been closely correlated with the notion of well-being (Wu 2007) and can be measured in terms of “happiness” (Australian Unity 2010); although challenging to assess, as people will derive differing amounts of pleasure from the same experience. This resonates with the “set point” theory of well-being where each individual is thought

Table 19.1 Well-being definitions

Definition	Reference
"Subjective well-being research is concerned with individuals' subjective experience of their own lives"	Diener (1984)
"Subjective well-being consists of three interrelated components: life satisfaction, pleasant affect, and unpleasant affect. Affect refers to pleasant and unpleasant moods and emotions, whereas life satisfaction refers to a cognitive sense of satisfaction with life"	Diener and Suh (1997), p. 200
Distinguishes this from the "traditional clinical models of mental health, subjective well-being does not simply refer to an absence of negative experiences"	
"We find that surveys of well-being utilise one or more of three definitions: (1) satisfaction with life, (2) health and ability/disability, and (3) composite indexes of positive functioning"	Kahn and Juster (2002), p. 630
"Well-being has been defined by individual characteristics of an inherently positive state (happiness). It has also been defined on a continuum from positive to negative, such as how one might measure self-esteem. Well-being can also be defined in terms of one's context (standard of living), absence of well-being (depression), or in a collective manner (shared understanding)"	Pollard and Lee (2003), p. 60
"Lay conceptions of well-being include dimensions of experience of pleasure, avoidance of negative experience, self development and contribution to others"	McMahan and Estes (2010)

Source: Adapted from Bell (2005)

to have a set point of happiness given by genetics and personality (Easterlin 2003). Life events may deflect above and below, but in time, hedonic adaptation will return an individual to this initial point. The theoretical framework for the interpretation of this data is the theory of "Subjective Wellbeing Homeostasis" (Australian Unity 2010). This proposes that everyone has a genetically determined "set point" for well-being that is internally maintained and defended, similarly to how body temperature is managed. Therefore, someone's satisfaction is in their mind and may or may not conform to the reality of the situation. It may be viewed as both a dependable variable representing the outcome of a customer's interaction with the tourist experience and a predictor variable predictive of enjoyment, and therefore, a well-being marker (Schwartz 1988). Various elements can comprise satisfaction: technical and functional quality (Grönroos 1984); performance-delivery quality (Parasuraman et al. 1991); product, behavior, and environmental factors (Philip and Hazlett 1997); and direct (essential) and indirect (subsidiary) factors (Davis and Stone 1991).

Satisfaction is experiential and linked to emotional feelings where, interestingly, negative emotions, particularly anger (Díaz and Ruíz 2002), appear to have a stronger effect than positive emotions (Liljander and Strandvik 1997; Dubé and Menon 2000). If well-being is considered unidimensionally in the paradigm of experience, a plausible inference is that satisfaction could affect the feeling of well-being based on emotional response. One definition of subjective well-being (SWB) is labeled life satisfaction and relies on the standards of the respondent to determine what the good life is. Another definition of the term denotes a preponderance of positive over negative affect, thus stressing a pleasant emotional experience. Domains that are closest and most immediate to people's lives are those that most influence SWB, but it has been identified that satisfaction judgments correlate quite highly (Diener 1984). Debate in the literature centers on the distinction between bottom-up or top-down theory of happiness in that some philosophers maintain that happiness is the sum of many small pleasures (i.e., bottom-up theory), while others would suggest that there is a global propensity to experience things in a positive way (i.e., top-down theory) thus placing the locus of SWB in attitude (Diener 1984).

Satisfaction in Need Constructs as Independent Variables

The research framework of this chapter is based on the *bottom-up spillover theory* which suggests that overall life satisfaction is on top of a satisfaction hierarchy as the superordinate domain, and it is functionally related to satisfaction with subdomains (Andrews and Withey 1976; Campbell et al. 1976; Diener 1984; Sirgy 2002; Sirgy et al. 2010). Satisfaction in need constructs are suggested as the independent variables which influence subdomain satisfaction and eventually overall life satisfaction, instead of the quantity of affect (i.e., positive affect and negative affect) which has been dominated as the determinant factors of life satisfaction in study of well-being, QOL, happiness, and life satisfaction.

Measurement Issues of the Quantity of Affect

Difference in the quantity of positive and negative affects has been measured as a major independent variable of overall life satisfaction (e.g., overall life satisfaction is the sum of positive affects minus the sum of negative affects) (Bradburn 1969; Sirgy et al. 2010). Several researchers, however, have raised measurement issues of the quantity of affect especially within survey research. First, as life is an ongoing dynamic process, factors affecting positive or negative experiences are continually changing (Kahneman et al. 2004a); therefore, the results may differ by the timing of measurement. Second, life satisfaction is neither a direct, verifiable experience nor a known personal fact like one's address or age; therefore, the life satisfaction measurement through a survey research method depends on each respondent's global retrospective judgment, which in most cases is constructed when asked rather than when actually happened (Kahneman and Krueger 2006). Third, life satisfaction reported through a survey is influenced in part by the respondent's current mood and memory, and by the immediate context, including earlier questions on the survey that cause particular domains of life to be temporarily salient (Kahneman et al. 2004a). Finally, reporting a lot of positive or negative feelings does not mean that those people are happier or unhappier than those who seldom report feelings. According to the Bradburn's studies (1969), there are a number of people who report having experienced both many positive and many negative feelings during the recent past, while others report few feelings of either kind, and both of these groups have similar distributions of self-reports of happiness.

Need Constructs

Because of those concerns discussed above, it is necessary to find alternative factors which determine the subdomain satisfaction and ultimately influence overall life satisfaction. In this chapter, satisfaction in need constructs are suggested as an independent variable based on *model of information needs* developed by Vogt and Fesenmaier (1998). Needs are important in human behavior because individuals bring them to the experience (Bettman 1979; Vogt and Fesenmaier 1998). Vogt and Fesenmaier (1998) defined needs as "an inner state which requires some stimuli that are lacking" (p. 554). Pearce and Lee (2005) also defined travel needs as "the biological and sociocultural forces that drive travel behaviour" (p. 228). Fodness (1994) explains how needs lead to an action: "the needs generate an uncomfortable level of tension within individuals' minds and bodies, and these inner needs and the resulting tension precipitate attitudes and, ultimately, actions to release tension, thereby satisfying the needs" (p. 558). According to the model of need constructs (Vogt and Fesenmaier 1998), individuals search for information to satisfy

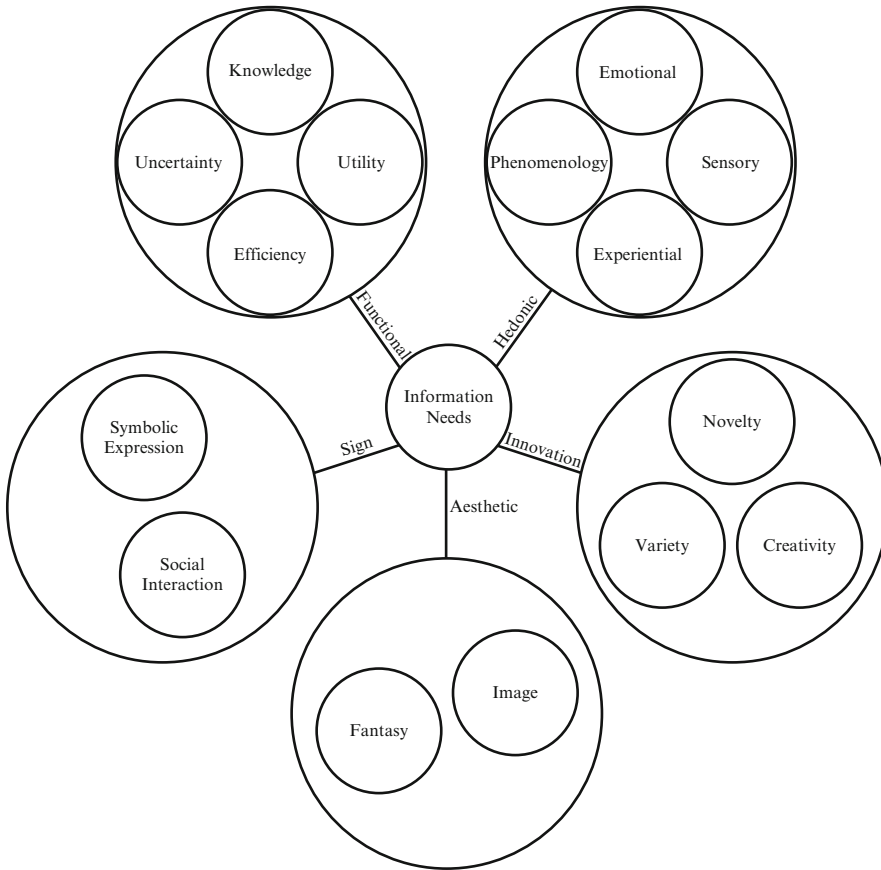


Fig. 19.2 Model of information needs (Source: Vogt and Fesenmaier 1998)

their needs in various constructs such as functional, hedonic, innovation, esthetic, and sign constructs (Fig. 19.2). Functional needs include knowledge, utility, efficiency, and uncertainty; hedonic needs include those related to emotion, senses, experience, and phenomenology; innovation needs include novelty, variety, and creativity; esthetic needs include image and fantasy; and sign needs include those related to society, symbols, and advice.

Although the model of need constructs has been tested in a context of travel information search (Cho and Jang 2008; Chung and Buhalis 2008; Vogt and Fesenmaier 1998; Wang and Fesenmaier 2004), its motivational approach should be well applied in a context of travel as well as in a context of overall life. Table 19.2 demonstrates how travel motivations can be categorized into the five constructs, and it indicates that those five need constructs integrate well with the existing travel motivation studies (Crompton 1979; Fodness 1994; Klenosky 2002; Oh et al. 1995; Pearce and Lee 2005). Vogt and Fesenmaier (1998) also found that individuals search for travel information not only for their trip planning but also for other purposes such as hedonic, social, entertainment, visual, and creativity purposes. Their finding indicates that the model can predict individuals' general motivational behaviors (Cho and Jang 2008).

Table 19.2 Travel needs and motivations within five constructs

Need constructs	Functional	Hedonic	Innovation	Aesthetic	Sign
<i>Original factors</i> (Vogt and Fesenmaier 1998)	<i>Knowledge, utility, efficiency, and uncertainty</i>	<i>Emotion, sensory, experiential, and phenomenology</i>	<i>Novelty, variety, and creativity</i>	<i>Imagery and fantasy</i>	<i>Social, symbolic, and advisory</i>
Crompton (1979)		Relaxation	Self-exploration and evaluation	Escape	Prestige, enhancement of kinship, relationship, and social interaction
Fodness (1994)	Knowledge and reward maximization	Punishment avoidance	Value expression		Social adjustive, value expression, and ego enhancement
Oh et al. (1995)	Knowledge and intellectual	Entertainment and rest	Novelty, adventure	Escape	Kinship, social interaction, and prestige
Klenosky (2002)	Accomplishment	Excitement, fun, and enjoyment			Self-esteem
	Learn more, know more, and be more productive	Relax, rest, and thrill	New/novel experience, challenge, get refreshed, and renewed	Escape	Socialize, meet people, look good, look healthy, and date more
Pearce and Lee (2005)	Self-development	Relax	Novelty, stimulation, self-development, and self-actualize	Escape, isolation, and nostalgia	Romance, relationship, and recognition

Satisfaction in Need Constructs and Study of Expectation and Satisfaction

The need constructs are also closely related to the study of expectation and satisfaction. According to *need theory*, life satisfaction or happiness is an indicator of whether certain needs are gratified (Nawijn et al. 2010; Veenhoven 2006). In the study of expectations and satisfaction, Gnoth (1997) also suggests that experience is a response to felt needs within various parameters such as temporal, spatial, social, and economic. He proposed a model, *the process of motivation and expectation formation* (Fig. 19.3), and discussed the roles of needs in the motivation and expectation formation process. According to the model, when needs are recognized and activated in a certain situation, generated motivation constitutes a major parameter in expectation formation, and the expectation, in turn, determines performance perceptions of products and services as well as perceptions of experiences. Consequently, motivation generated by felt needs forms expectations and impacts on satisfaction formation (Gnoth 1997).

There are two main theories from consumer behavior research which can be used to investigate satisfaction. The *disconfirmation theory* (Jones and Ioannou 1993) suggests that consumers develop feelings of satisfaction/dissatisfaction based on levels of expectation, attitude, and intention toward as yet untried products or services, and disconfirmation occurs when there is a discrepancy between expectation and performance. The second theory arising from Cadotte et al. (1987) is referred to as *expectancy-value theory* where emphasis is placed on the weighting difference between product attributes and consumer satisfaction i.e., the customer has different

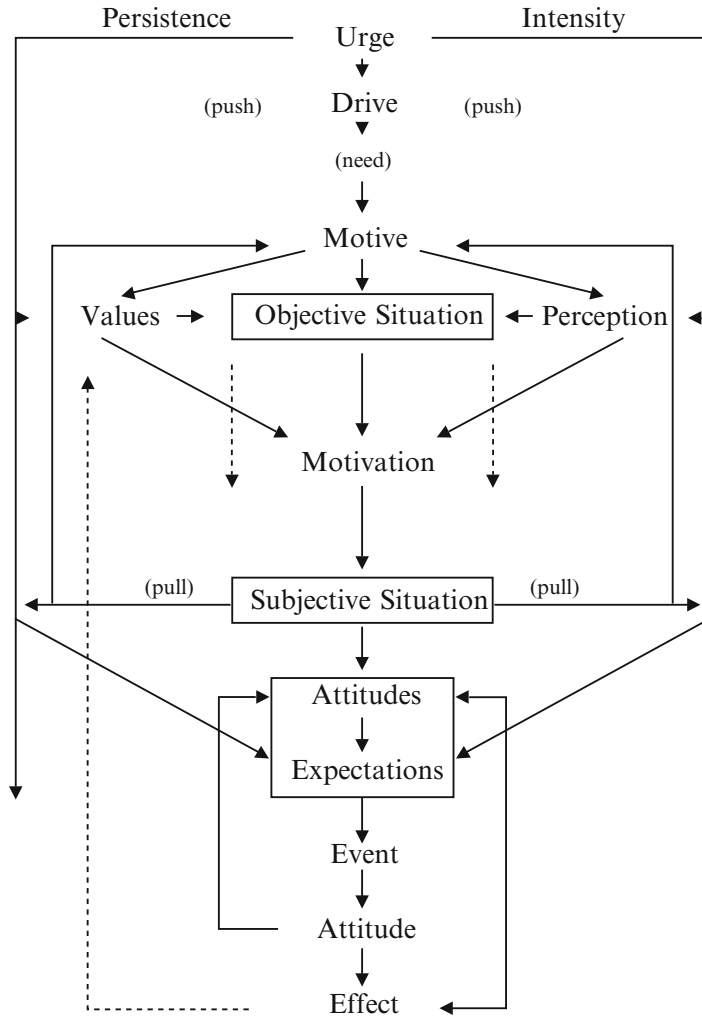


Fig. 19.3 The process of motivation and expectation formation (Source: Gnoth 1997)

perceptions, and their choice/satisfaction is dependent on which attribute is most valued. Positive disconfirmation (satisfaction) occurs when product/service performance is better than expected, while negative disconfirmation (dissatisfaction) occurs when product/service is less than expected (Chu 2002).

Most studies of tourist experience favor an “assimilation” model, whereby consumer judgments tend to shift toward the direction of prior expectations, minimizing the apparent discrepancy between what was expected and what was experienced (Mela 1999). The assimilation model predicts that any low expectations will influence the actual acceptance of the situation down, regardless of its intrinsic quality. Alternatively, if expectations can be elevated, acceptance should increase, even so, expectations and perceptions can be volatile (Pizam and Ellis 1999). If performance is significantly below or above expected levels, the consumer may realign expectations. Moreover, expectation levels may rise with constant satisfaction or alternatively fall with consistent dissatisfaction. Although customer satisfaction has been defined in various ways, the underlying conceptualization is that satisfaction is a factor of both pre- and postexperience evaluative judgments, leading to an overall feeling about a specific encounter (Parker and Mathews 2001).

A Proposed Model: The Internet as a Tool for QOL

When the Internet first became available to the general population, researchers discussed the impacts of the Internet on work and leisure, such as whether the Internet increased individuals' free time from work. The Internet enhances the possibility of work without temporal and geographical limits, and this phenomenon is often perceived as an advantage in terms of convenience and efficiency. For example, an individual does not have to give up a family vacation for work as the Internet enables him/her to be connected with his/her work place. However, it simultaneously means that he/she needs to work during the vacation. A few researchers have found that while blue-collar workers' work hours is decreasing, white-collar and/or IT-job-related workers' work hours is increasing in the US, and their unconventional work hours increases stress and negative health outcomes (Fenwick and Tausig 1994; Jacobs and Gerson 1998; Sharone 2004). It is presumed that the constant connectivity increases work load rather than decreasing it as people are instantly contactable and are less constrained by physical presence or working hours.

The Internet in particular revolutionized the entire tourism industry, affecting both tourism demand and supply in unprecedented ways (Buhalis 2003). However, this phenomenon does not necessarily mean that the Internet itself creates or guarantees a high level of travel satisfaction (Wolters and Fridgen 1996). This section, therefore, focuses on the moderating role of the Internet with another independent variable (i.e., travel need satisfaction), rather than considering the Internet as a sole independent variable of overall travel satisfaction and overall life satisfaction (Fig. 19.4). The model proposes that the moderating effects of the travel need satisfaction and the Internet significantly affect the overall travel satisfaction and ultimately overall life satisfaction.

The Internet is perceived as a useful and/or convenient tool for communication and commercial transactions in travel and tourism contexts (Buhalis and O'Connor 2005). Due to a higher level of perceived risks caused by travel product characteristics (i.e., intangibility, perishability, inseparability, and heterogeneity) (Parasuraman et al. 1985), the travel decision-making process is information-intensive and travelers often purchase travel products in advance to reduce the potential risks (Jun et al. 2007). In this circumstance, the Internet plays a significant role in satisfying functional travel needs such as needs for knowledge enhancement, utility maximization, increased efficiency, and reduced uncertainty (Vogt and Fesenmaier 1998). The Internet also enables travelers to access a greater amount of information. Data gathered through the Internet is in many cases provided directly by suppliers or other customers who have previously experienced the same products; therefore, it is often transparent and reliable. This is particularly the case for accessible tourism, where specific information is of critical importance of whether facilities, routes and services are accessible to people with special needs (Buhalis and Michopoulou 2010). The Internet also makes easy to compare travel information including real-time prices and availability via search engines and metasearch engines (e.g., Kelkoo, Kayak) (Wöber 2006); thus, individuals are able to secure a good bargain. According to *Internet Paradox* (Porter 2001), the increased transparency in the marketplace empowers consumers to find the best prices and thus reduces the profitability of tourism organizations. From a consumer point of view, the Internet has provided a tool to individuals to find the best bargains in the marketplace, making tourism more accessible to all social classes.

While the Internet contributes substantially to satisfy functional travel needs, it also aids in satisfying other needs: needs for having fun, enjoyment, amusement, and entertainment while searching for travel information (i.e., hedonic needs); needs for fantasizing about visiting new places through pictures/videos posted on websites (i.e., aesthetic needs); needs for sharing information with others through the Internet and consequently obtaining recognition from others (i.e., sign needs); and needs for simply satisfying curiosity via gaining a variety of new knowledge related to travel destinations worldwide (i.e., innovation needs) (Chung and Buhalis 2008; Vogt and Fesenmaier 1998; Wang and Fesenmaier 2004).

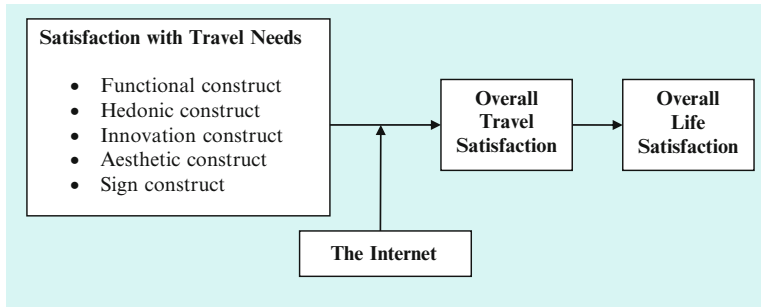


Fig. 19.4 The Internet as a tool for life satisfaction

The Internet Facilitates Realistic Expectation Formation and Satisfaction

The Internet enhances satisfaction of each travel need because of its convenience and usefulness, but it is still questioned to what extent this is true or if there is any other significant Internet role affecting overall travel satisfaction. Taking a comprehensive approach, we suggest that all Internet factors on the whole help individuals adjust expectations to be realistic, so the negative gap between expectation and performance (e.g., the performance is perceived worse than expected; the expectation is too high to fit in with the performance) is reduced. As travelers are able to have realistic expectations, the probability to be matched between expectation and performance perception is high; accordingly, they are more likely to feel satisfied with a trip in the end.

Researchers have found that previous experiences increase consumer confidence in making more realistic decisions (Fenech and O’Cass 2001; Kim et al. 2009; Sönmez and Graefe 1998). Kim et al. (2009) interpret this phenomenon as that the increased amount of knowledge gained from previous experiences enables individuals to compare their perceptions and the reality, thus altering their expectation accordingly. Traditionally, knowledge gained from previous experiences and friends and relatives has been perceived as the most reliable information. After the emergence of the Internet, information shared by other customers through independent review websites (e.g., TripAdvisor) is also perceived as objective and reliable (Au et al. 2009). Thus, it is suggested that an increased amount of transparent and reliable information collected via the Internet contributes to satisfaction formation through enhancement of realistic expectation formation.

The Internet role, adjusting expectation to be realistic, is also supported by *mental simulation* (MacInnis and Price 1987). Individuals utilize mental simulation processing to assess plausibility of their travel plan (Jun and Gibson 2007). For example, an individual visually imagines a scenario of product use (i.e., travel experiences), recognizes potential problems, and prepares solutions to the potential problems (MacInnis and Price 1987). Bone and Ellen (1992) also suggest that individuals put themselves in a future situation or scene through imagination to assess whether the information obtained is plausible, likely, and credible. Due to the Internet, it has become much easier to explore various types of information especially which stimulates multi-sensory responses (e.g., vivid images, videos) and this type of information evokes mental simulation (MacInnis and Price 1987; Schlosser 2003). Through this mental imagery process evoked by the Internet, individuals are able to familiarize with the potential destination, develop involvement with the destination, and subsequently, have more realistic expectation toward the destination at a pretrip stage.

A Proposed Model: The Internet as a Social Platform

The previously proposed model (Fig. 19.4) focuses on the Internet role as a tool for information search and purchase, specifically in context of travel planning at a pretrip stage. The Internet roles, however, have evolved from a travel planning tool to a virtual tourism place where people can share their concerns, interests, information at each of their before, during, and after stages of their travel experiences. Since the virtual place is having an increasingly stronger influence in an individuals' life, another model is proposed to capture the evolving roles of the Internet as the virtual place, specifically as a social platform where people have satisfaction with various needs such as functional, hedonic, innovation, esthetic, and sign (Chung and Buhalis 2008; Wang and Fesenmaier 2004) (Fig. 19.5). This proposed model (Fig. 19.5) assumes that satisfaction with travel needs affects overall travel satisfaction; satisfaction with Internet needs affects overall Internet satisfaction; and the overall travel satisfaction and the overall Internet satisfaction, which are probably mutually reinforcing, affect overall life satisfaction. Although the Internet as a social platform has significant impact on consumers' preconsumption, during-consumption, and postconsumption behaviors, in this model, individuals' Internet use behaviors are delimited to the postconsumption (e.g., after trip) behaviors.

According to the US Travel Industry Association (TIA) (2008), Internet roles have evolved into three stages. While the previous model (Fig. 19.4) is primarily concerned with the planning stage of trips and thus concentrates as a tool at the stages of "electronic brochures" (1995–2000) and "booking engines" (2001–2005), this model (Fig. 19.5) represents the Internet role as a social platform at the stage of "dawn of consumer engagement" (2006–present). The latter phenomenon stems from the emergence of Web 2.0 and UGCs which are developed and shared through social media (e.g., blogs, wikis, file sharing, social networks). The term Web 2.0 refers to "the second-generation of Internet-based services that let people collaborate and share information online in perceived new ways, such as social networking sites, blogs, wikis, communication tools, and folksonomies" (p. 13) (Turban et al. 2008).

Through the Web 2.0-generated platforms, individuals are able to have more interactive and collaborative experiences with others (Turban et al. 2008). In addition, individuals are empowered in information control as they can create/fortify/share information and maintain information transparency accordingly. All these functions (e.g., interaction, collaboration, consumer empowerment in information control), enhanced by Web 2.0 and its applications, contribute to overall life satisfaction. *Self-determination theory* purports that overall life satisfaction and subjective well-being will be highest when individuals engage in behaviors that satisfy three universal psychological needs, autonomy, competence, and relatedness (Howell et al. 2009). Internet use at social platforms fulfills all these criteria in that autonomy is achieved by feeling in information control, competence is achieved through the increased capacity to bring about a desired outcome in information management and product consumption (Ryan and Deci 2000), and relatedness is achieved by feeling connected with others due to the enhanced interaction and collaboration (Reis et al. 2000). Especially, relatedness-promoting behaviors are strongly associated with increased enjoyment (Howell et al. 2009) and one would therefore surmise satisfaction.

Memory Reconstruction and Satisfaction Modification

A few researchers have argued that the impact of travel experience on posttrip life satisfaction is not very large, and it does not last long (De Bloom et al. 2009; Gilbert and Abdullah 2004; Nawijn et al. 2010). According to Gilbert and Abdullah (2004), the posttrip happiness period

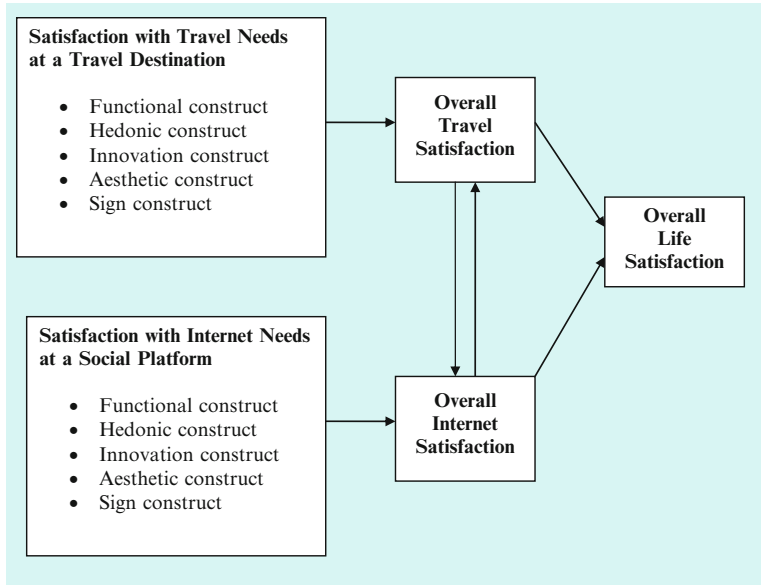


Fig. 19.5 The Internet as a social platform toward life satisfaction in Web 2.0 Environments

spans a period of 2–6 months. Nawijn et al. (2010) also found that individuals were more likely to feel happier at a pretrip stage rather than at a posttrip stage. There are three potential reasons for that: (1) holiday stress is associated with posttrip happiness, (2) anticipation plays an important role to have stronger pretrip happiness, and (3) most pleasure travelers have to return to work or other daily tasks and consequently fall back into their normal routine fairly quickly (Nawijn et al. 2010). These study results raise a question that if a trip effect on life satisfaction is not prolonged and significant, why people keep purchasing expensive travel products and spending a significant amount of time on pleasure trips. A potential answer could be related to travel memory which may be supported by the fact that nostalgia is one of the most significant travel motivations.

Inconsistency between the actual experience and the postexperience memory has often been discovered, and researchers have debated about which measurement between the actual experience and the postexperience memory is more meaningful to understand, happiness or overall life satisfaction. According to Kahneman et al. (2004b), when women were specifically asked about enjoyment of day-to-day experiences, taking care of their children was ranked poorly even below cooking and only slightly above housework, but the results of a TIME poll on happiness conducted in 2005 (Wallis 2005) indicated that children were the main reason for the feeling of greatest joy and happiness. Similarly, if a person is randomly asked to respond to survey questions during a vacation, he/she may report unhappy at that moment because he/she is waiting furiously for a slow-moving waiter to take an order. However, if the person is asked about the vacation after the trip is over, he/she may remember the peak moments of the trip and reports a higher level of happiness (Wallis 2005). These two examples imply the importance of the postexperience memory in overall life satisfaction.

Memory is often distorted. *Reconstructive memory* (Bartlett 1932) notes that the most recently presented information contaminates memory of a past experience (Braun 1999; Braun-LaTour et al. 2006; Jun et al. 2007; Smith 1993). According to Braun-LaTour et al. (2006), there are three factors known to influence memory reconstruction: (1) the more similar the suggested postexperience activity is to what people actually experience, the more likely source confusion may occur

and result in memory distortion (Johnson et al. 1988); the more credible the source, the more likely the post experience information will be accepted and integrated into one's original memory (Lampinen and Smith 1995); and if the postexperience information is more plausible, it is more likely to influence the tourist's memory than if the claim is implausible.

Reconstructed memory is heightened due to the *mental imagery processing* enhanced by the Internet (Lakshmanan and Krishnan 2009; MacInnis and Price 1987; Schlosser 2003; Schlosser 2006). Although imagery is integrated with consumption at all stages (i.e., pre-, during-, and post-consumption), it is more likely to be utilized for postconsumption experience especially after the emergence of Web 2.0 and multimedia. In particular, Facebook, Flickr, and YouTube have played and made significant inputs in enhancement of mental imagery after trips. This is because these technologies make it easier to communicate and socialize with others through the many different forms of information such as texts, photos, videos, and music. Writing about travel experience on blogs (e.g., TravelBlog.org), microblogging (e.g., Twitter) or social networking (e.g., Facebook), posting travel photos and videos on multimedia platforms (e.g., Flickr, YouTube), or writing travel reviews on independent review websites (e.g., TripAdvisor) involve mental imagery processing, and this posttrip imagery processing often boosts distorted memory (i.e., false recall) (Lakshmanan and Krishnan 2009). Hence, postconsumption experience through online social platforms reconstructs travel memory; the reconstructed memory possibly modifies satisfaction related to the past trip, and it affects overall life satisfaction in the end.

The following examples show how the online social platform experience after a trip can modify satisfaction. A married couple with a little baby had a hard time to sleep during their vacation because the hotel did not provide a baby crib. When this couple came back home, they had unhappy memories about the trip and were dissatisfied. However, while they were posting photos of their smiling baby taken during the trip on their blog, they remembered positive moments at the destination and they concluded that the trip was pleasant (i.e., satisfaction with hedonic needs). The couple were also not happy with the small size of the hotel room. However, after the trip, they read other customers' review on TripAdvisor and learned that their room size was normal in that country (i.e., satisfaction with innovation needs). The realization that they did not overpay for the hotel room changed their impression about the hotel from negative to neutral or even positive (i.e., satisfaction with functional needs). Later, the couple posted a hotel review related to the baby crib availability (i.e., satisfaction with sign/advisory needs) and the hotel manager immediately and sincerely left a message with apology and promised to improve for future customers (i.e., satisfaction with sign/social needs). The hotel's prompt reaction gave the couple a great impression that the hotel was willing to communicate with customers and valued customers' opinions. Finally, they also received positive comments from potential travelers at the review website because of the useful information that they had provided. The couple then felt appreciated (i.e., satisfaction with sign/symbolic needs). All these postconsumption experiences at the online social platform reconstruct memories from negative to positive about the hotel and the trip overall, and those reconstructed memories may even modify travel satisfaction and hence overall life satisfaction.

Conclusions

This chapter proposed two conceptual models which explored the impact of the Internet on travel satisfaction and overall life satisfaction. The first model (Fig. 19.4) focused on the Internet role when it was considered as a tool for travel planning at a pretrip stage, and the second model (Fig. 19.5) focused on the Internet role when it was considered as a social platform on a Web 2.0 environment where people shared travel information after a trip, communicated, and socialized

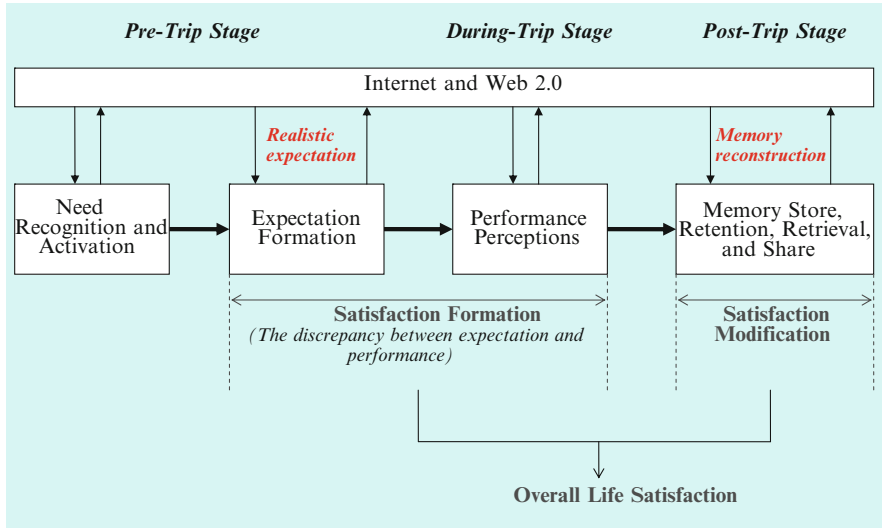


Fig. 19.6 Information processing and the roles of the Internet in satisfaction formation and modification

with others. This chapter found two significant roles of the Internet in satisfaction formation and satisfaction modification (Fig. 19.6). In terms of satisfaction formation, the greater amount of transparent and reliable information collected through the Internet at the pretrip stage helps individuals adjust expectations to be realistic, and the realistic expectation leads to reduce the negative satisfaction disconfirmation and maintain a higher level of satisfaction. In terms of satisfaction modification, postconsumption experiences at the social platform reconstruct previous memories and accordingly modify satisfaction. The modified satisfaction eventually influences overall life satisfaction.

This chapter contributes to the QOL research because it suggests the alternative independent variables of travel satisfaction and overall life satisfaction, which are in five need constructs and can be measured through survey research methods. Future studies should be conducted to test the two proposed models. The proposed models in this chapter focus on pretrip behavior and posttrip behavior. However, the Internet with mobile technology and location-based technology is increasingly playing a significant role in travel satisfaction at the during-trip stage. Future study should be conducted to explore the Internet role at this stage and its impacts on travel satisfaction and overall life satisfaction.

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Part III
QOL from the Perspectives of Residents

Chapter 20

Cultural Tourism and the Enhancement of Quality-of-Life

Bob McKercher and Pamela Ho

Introduction

Cultural tourism has emerged as a significant tourism activity in the past few years as tourists want more authentic, back of house travel experiences (Lindberg et al. 1999). As a result, many destinations have begun to promote their tangible and intangible cultural heritage for tourist consumption. The process of cultural tourism product development involves transforming extant cultural and heritage assets into tourism products and, in doing so, turning both community resources and residents into active or passive participants in tourism, sometimes without their consent. As a result, the process of cultural tourismification has the potential to exert significant positive and adverse effects on residents' quality-of-life. Much of the literature acknowledges positive economic impacts, but asserts that the results and adverse social and cultural impacts outweigh any economic gain. In reality, the story is much more subtle and nuanced. Many of the alleged adverse impacts are not supported when tested empirically, while a broader array of non-economic impacts that provide real community benefits are often ignored. This chapter will focus on cultural tourism as a mechanism to enhance community quality-of-life through a comprehensive review of the literature, supplemented by case studies from Hong Kong, China.

Setting the Context

The examination of the relationship between cultural tourism and community well-being must begin by setting the context in which these terms will be discussed.

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Cultural Tourism

Cultural tourism is still an emerging concept with fuzzy boundaries. McKercher and du Cros (2005:212) have developed a working definition of cultural tourism as “a form of tourism that relies on a destination’s cultural heritage assets and transforms them into products that can be consumed by tourists.” This definition recognizes that cultural tourism is first and foremost a form of tourism designed to benefit its main audience, the tourist – a nonlocal resident whose consume places for their extrinsic appeal as attractions. Tourists are substantially different from residents who may use the same place for its intrinsic values. But, as a form of tourism, its core building blocks are a community’s tangible and intangible heritage. As such, the successful cultural tourism transformation process involves balancing the legitimate needs of both tourists and residents alike. Too much emphasis on tourist needs will cause unacceptable impacts on the local community. Ignoring tourists’ needs will result in failed products. Ideally, then, cultural tourism has the potential to achieve the triple bottom-line of optimal economic, social, and environmental outcomes.

There is growing evidence that cultural tourism may help to revitalize destinations and enhance quality-of-life in many ways. Economic benefits including employment for locals and revenue generation for conservation are often the most obvious rationale given for conserving and promoting heritage for the tourist market (Tuan and Navrud 2008). Additionally, developing tourism based on the heritage values of a destination may enhance the residents’ identity (Xie 2006). Hall and Lew (2009) have given a detailed analysis and explanation of the various types of impacts of tourism and the way that tourism can be managed for the optimal results. Regional restructuring and economic development in a number of places have been achieved by promoting tourism (Xie 2006; Edwards and Llurdes 1996; Gordon and Raber 2000; Mansfield 2002).

Cultural assets can be classified as either being tangible and intangible. Tangible heritage assets represent the built fabric of a community that embodies its cultural values (UNESCO 2000). Heritage buildings, streetscapes, entire communities, archaeological sites, and battle fields are among the many examples of tangible heritage that have been developed effectively for tourism. In addition, some people also argue that purpose-built cultural attractions including museums, art galleries, and historic theme parks can also be considered as representations of tangible heritage. Prentice et al. (1998) and Teo and Yeoh (1997) note that theme parks, in particular, are certainly not authentic in the true sense, but they often provide people an opportunity to have an enjoyable, mindful, or stimulating interaction that can provide insights into the past.

The 2003 UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage defines intangible culture as the practices, representations, expressions, as well as the knowledge and skills that communities, groups, and, in some cases, individuals recognize as part of their cultural heritage (UNESCO 2003). It can include such elements as collections, past and continuing cultural practices, literature, music, dance, handicrafts, rituals, storytelling, knowledge and living experiences, and also oral culture and intangible heritage, including folklore (UNESCO 2003).

It is more difficult to present intangible heritage for tourist consumption than tangible heritage, for the very act of commodifying it must change the experience, especially if the type of intangible heritage presented represents fundamentally private activities. Indeed, festivals, events, and performance seem to be the most popular ways of presenting intangible heritage (Copley and Robson 1996), for they are essentially public events where most people are welcome. Community festivals celebrate both group and place identity (De Bres and Davis 2001), while Daniel (1996) illustrates that dance has long been commodified for consumption. Performance can also extend to costumed performers assuming personas in theme parks, individuals using traditional techniques to produce

handicrafts, or “re-enactors” who may restage historic events and battles (Daniel 1996). Some cultural heritage managers decry such actions, but they can retain their authenticity and creativity in a tourism setting, providing that all understand it is a form of staged authenticity and providing it is delivered in a culturally responsible manner.

Tangible and intangible heritage are closely linked. If tangible heritage represents cultural hardware, then intangible heritage represents cultural software. The division is often arbitrary, for built heritage constitutes visible evidence of intangible heritage as reflected by the social economic and political history of the time (Hankey and Brammah 2005:8). Kirshenblatt-Gimblett (2004) argues that tangible heritage without a connection to its intangible roots represents a mere shadow of its original sense and meaning. This link has emerged as a critical issue in the debate about adaptive reuse of heritage buildings, as will be discussed in Case 1 later in the chapter.

Dimensions of “Community”

Cultural heritage belongs to the community of the destination. Turning it into a tourist product may affect the community in one way or the other. In its simplest form, a community can be thought of as a group of interacting people. We tend to think of “community” in simplistic terms as a single cohesive unit of individuals who share similar beliefs, values, or common characteristics. In reality, though, the idea of “community” is dynamic and also has fuzzy boundaries. Individuals can belong simultaneously to many different communities (i.e., a professional community and a neighborhood), can be temporary members joining and leaving a community repeatedly, or can move between communities (i.e., to a different neighborhood). Moreover, some communities are inconclusive, while others are largely exclusive. Communities can also exist at different geographical scales, ranging from the micro to the global.

Cultural tourism can impact the quality-of-life of four different scales of community:

- Neighborhood communities – which include sub-groups of a larger urban or rural region and incorporate ethnic minority groups, neighborhoods, and the like
- Local communities – which represent the aggregate community in a single urban or rural setting
- National communities - which include citizens and permanent residents from a single economy
- International communities – which include noncitizens of the country/economy where the heritage asset is located

This spatial differentiation builds on work by Timothy (1997) who identified four levels of connectivity to heritage tourism attractions, i.e., world, national, local, and personal. World heritage attractions may draw large masses of tourists who may be keenly interested in these places but who may have only peripheral feelings of personal attachment. National heritage assets are those that symbolize a society’s shared recollections that represent durable national icons and reflect national pride. Domestic tourists may feel a sense of pilgrimage by visiting these places and paying homage to national symbols that represent their shared identity. At a more local level, individuals need some type of attachment to familiar landmarks so that they can remain in touch with their and their community’s collective past. Personal connectivity occurs at an even smaller scale, where the individual, his or her family, or his or her small ethnic group visits places where they have a close sense of identity.

Importantly, how heritage is valued and presented will determine which community or communities feel a sense of attachment. Timothy (1997) illustrates that most heritage assets serve a local audience and have only local meaning. They provide an important experience for locals, but

outsiders may not be able to relate to them as well. Cave et al. (2003), for example, examined community attitudes to a proposed Pacific Island cultural center in New Zealand and found it had strong appeal to the Pacific Island community, but was of limited appeal to the dominant European community. Besculides et al. (2002) came to a similar conclusion when they compared attitudes of Hispanic and non-Hispanic residents living beside a scenic touring route that highlighted Hispanic culture. Hispanic residents felt a stronger sense of attachment and community pride from this tourism product than non-Hispanics.

Impacts of Cultural Tourism on Quality-of-Life

Surprisingly little in-depth research has been conducted attempting to document how cultural tourism can exert a positive impact on the quality-of-life of the affected communities. Instead, this issue is largely glossed over by broad generalizations and unspecified assertions. Indeed, when examining this topic, it became evident that much of the so-called “evidence” of the positive impacts of cultural tourism was based on largely anecdotal case studies found in a World Tourism Organization report written almost 30 years ago titled *Social and Cultural Impact of Tourist Movements* (WTO 1981).

Fortunately, a growing body of literature is now examining this issue in a much more rigorous, balanced, and comprehensive manner. These studies identify five broad thematic domains of: economic development; conservation and adaptive reuse; nation building and national mythmaking; community well-being; and the provision of leisure and recreation opportunities. The first two topics, economic development and conservation, have received much attention, yet, as will be discussed, their contributions to quality-of-life tend to be less than issues arising in the last three thematic areas. Such benefits can range from legitimizing popular culture as part of a community identity (Xie et al. 2007) to valuing minority culture (Bossen 2000; Cave et al. 2003; Conforti 1996; Santos et al. 2008) and enhancing cultural understanding (Ashley et al. 2000; Chang 2000; Williams and Stewart 1997). Table 20.1 summarizes the key sub-themes identified in the literature under each of these domains and also illustrates which communities have been identified. The following discussion elaborates on this table.

Economic Development

Clearly, tourism has been identified as a powerful economic development tool that can help restructure communities in decline, as well as reduce poverty (Edwards and Llurdes 1996; Gordon and Raber 2000; Hall and Lew 2009; Xie 2006). Many of the world’s most popular attractions, such as Giza Pyramids in Egypt, Angkor Wat in Cambodia, the Great Wall in Beijing, China, are the stimulus for a vibrant tourism sector. With an attraction of regional or international significance, a destination enjoys the spin-off effects of tourism which bring in revenue to other local economic sectors. It may also serve to revitalize places. Within a cultural tourism context, Hovinen (1995) discusses how population increase, land scarcity, and rising land prices are making it increasingly difficult for the Amish in Lancaster County, Pennsylvania, to pursue their traditional agricultural lifestyles. Some 60% of Amish now have nonfarm jobs, with many involved in the tourism trade. Many of them are involved in the craft trade or making jams and preservatives for tourists. Marwick’s (2001) study of Malta revealed that the tourism crafts sector has effectively replaced the void left by the decline of the export market for Maltese crafts and, in doing so, has revitalized the existing lace-making tradition and created new employment opportunities in the glassblowing and metalworking area.

Table 20.1 Community well-being benefits of cultural tourism

Benefit	Community	Sub-local	Local	National	International
<i>Economic development</i>					
	Job creation		X	X	
	Income generation		X	X	
	Economic development		X	X	
	Training and capacity building		X	X	
<i>Conservation and adaptive reuse</i>					
	Conservation	X	X	X	X
	Adaptive reuse	X	X		
	Developing sense of personal guardianship of heritage	X	X		
	Conserve, value ethic areas	X	X		
	Stop the illicit trade in artifacts		X	X	X
<i>Nation building and national mythmaking</i>					
	National image/identity			X	X
	National mythmaking		X	X	X
	Postcolonial identity/re-identification			X	X
	Sharing history/living history		X	X	
	Addressing, resolving, or highlighting contested histories	X	X	X	
	Developing a collective identity/history			X	X
	Enhancing a national sense of belonging			X	
<i>Community well-being and connection to place</i>					
	Partnerships		X		
	Improved quality-of-life		X		
	Developing/enhancing community pride and a sense of community/belonging		X	X	X
	Linking communities		X		
	Building group and place identity		X		
	Value minorities/cross-cultural understanding	X	X	X	X
	Build sense of nostalgia		X		
	Social inclusivity and balance		X		
	Maintain/revitalize traditions and local culture	X	X	X	
	Enhance local identity/place attachment	X	X	X	X
	Enhance ethnic identity	X			X
	Highlight popular culture	X	X		
<i>Provision of leisure and recreation opportunities</i>					
	Rationale for cultural, heritage product development	X	X		
	Produce authentic experience		X		
	Serve multiple functions and multiple users	X	X		

Other research studies have documented the type of enterprise and income generation opportunities that otherwise would not exist without cultural tourism, with much of it focusing on indigenous or ethnic minority communities (for example, Altman 1992; Muller and Pettersson 2001; Williams and Stewart 1997; Yang and Wall 2009). The range of enterprises includes accommodation and food service, cultural centers, handicraft and local art works, and festivals or special events. Especially in indigenous communities, cultural tourism is often one of the few economic development opportunities available. While its absolute benefits may be limited, the community is generally perceived to be better off than before it pursued tourism (Ashley et al. 2000), with the added benefits of helping preserve local cultural traditions and foster understanding between different groups (Williams and Stewart 1997).

Capacity building is an additional benefit (O'Sullivan and Jackson 2002), with much research being conducted in the handicraft's sector. Handicrafts have much appeal as an economic stimulator for their low barriers to entry (Jamieson 2000) and the ability to both use and help preserve local traditions (Williams and Stewart 1997). For example, Les Artisans D'Angkor, an initiative of the European Union as a means of helping young Cambodian artisans, many of whom were disabled during the years of civil war, to find work in their home villages, provides them with a trade and role in society (AD 2010). These individuals were trained to make reproductions of Angkor Wat's artifacts for the tourist trade. At present, some 600 plus people are employed as artisans, trainers, and sales and marketing staff.

Quantifying other economic benefits of cultural tourism, though, is a much more difficult task, for it is hard to disaggregate the tourism element of the cultural sector from the local resident use element when attempting to document either expenditure or job creation. Moreover, such an artificial distinction may be rather meaningless. A study of folk festivals in the UK (Anon 2003) revealed that they generate about £77,000,000 of revenue each year, with much of the money spent on local goods and services. Greffe (2004) analyzed participation in heritage tourism in France and concluded that about 136,000 jobs were created directly, with another 80,000 indirect jobs attributed to cultural tourism. Yet, in both instances, the figures were derived based on all visitors, not just tourists. In reality, the contribution attributed directly to the tourism is, no doubt, much smaller.

Conservation and Adaptive Reuse

The role of cultural tourism as a catalyst to conserve tangible heritage assets is well documented (Harrison 1997; Brokensha and Gruldborg 1992; Nolan and Nolan 1992; Simons 2000). Tourist revenue provides excellent source of funding for the conservation work of heritage and therefore justification for conservation and preservation of both tangible and intangible heritage. Making tourism as the major income generator, governments as well as local communities therefore realize the importance of bringing in tourists to heritage sites to sustain the maintenance and operation of the sites. Interestingly, the development of tourist handicrafts may also slow the illicit trade in antiquities by providing tourists with the opportunity to purchase an authentic reproduction of the artifacts they have seen during their travel. The World Monuments Fund lists the 100 most endangered sites (WMF 2006). Many of them are threatened by the illegal actions of collectors and souvenir hunters who steal relics. The tourist market has proven to be a lucrative outlet for these artifacts, especially since many tourists are looking for original, authentic items and want to buy them at their place of origin (Ventacachellum 2004). The illicit trade in small artifacts and small archeological relics such as stone writing tablets, jewelry, beads, seals, and

tablets is especially prevalent among tourists. Stopping looting was one of the objectives behind the establishment of Les Artisans D'Angkor by making authentic souvenirs, in situ for the tourist market.

Most studies, however, discuss how tourism has provided the economic rationale to preserve individual historic buildings (Caffyn and Lutz 1999), urban districts threatened by redevelopment (du Cros et al. 2005; Hankey and Brammah 2005) or to conserve the fabric of ethnic neighborhoods (Chang 2000; Conforti 1996; Santos et al. 2008). Chang and Teo's (2009) examination of the adaptive reuse of three-story shop houses (shops on the ground floor with houses above them) in Singapore by converting them into boutique hotels provides a typical example. Shop houses were the most common architectural style found throughout Singapore's business district through to the mid twentieth century. However, development pressures meant that many had been torn down and replaced by more modern high-rises. They did not become valorized as heritage until the late 1980s when the number began to disappear rapidly. The remaining shop houses were most likely to be found in run-down ethnic neighborhoods that had not yet been redeveloped, with the largest concentration in the Chinatown historic district. The declaration of the area as a "historic conservation district" in the late 1980s and the removal of rent controls enabled the area to be transformed. Private owners saw the value in conserving this type of vernacular architecture. Today, the hotels are seen as an expression of local identity and, importantly, the hoteliers see themselves as custodians of important heritage.

Preservation of buildings or streetscapes often entails adaptive reuse or finding an alternative use for the revitalized structure. Sometimes though, saving buildings by converting them to other uses may conserve the tangible heritage, but the very act of adaptive reuse may result in the destruction of the even more valuable intangible heritage associated with the building (McKercher et al. 2005). The end result can be mixed, providing some use benefits to local residents and tourists but at a high cost of the loss of historic significance. Case 1 discusses how an extreme example of adaptive reuse that involved physically relocating an historic structure to a tourism node.

Case 1 Murray House – Extreme Adaptive Reuse with Mixed Results

Murray House was built in what was to become downtown Hong Kong 1844 and used as barracks by the British army. Rapid urban development in the 1970s and 1980s resulted in the demolition of other buildings in the area, leaving Murray House as a relic among modern high-rises. The decision was made to demolish the building and redevelop the site. However, public outrage led the government at the time to reconsider this decision. Instead, they opted to demolish the building and reconstruct it at another site to be determined at some future date. The building was dismantled in 1980, and its more than 3,000 stones were stored for more than a decade. Finally in 1998, it was rebuilt on a piece of reclaimed land in the tourist shopping and dining hub of Stanley on the south coast of Hong Kong Island (see photo). It was opened in 2000 and houses a number of restaurants and the privately owned Maritime Museum.

(continued)

Case 1 (continued)



(Photograph by the authors.)

Its legacy is mixed. On the one hand, it has become the focal point of Stanley and is a popular attraction for tourists, the expatriate community, and some Hong Kong residents. Many visitors apparently believe the new, artificial setting is the original location of the building.

The decision to move it, however, has been condemned by cultural heritage managers for its loss of both the building's intangible values as well as its historical setting. At best, they see it as a pyrrhic victory, with the preservation of the building coming at the total loss of its significance. Local residents have also given it the unofficial title of "ghost house" due to its setting out of place and time.

This case highlights the various interpretations different groups may place on heritage attractions and stresses the challenges of adaptive re-use. On the one hand, Murray House has provided recreational, museum, and dining opportunities for residents and tourists alike and has also helped create an identity for a tourist node. But, on the other hand, these benefits have come at a cost of the total loss of value and meaning of the original structure.

Nation Building and National Mythmaking

Job creation and conservation of historic buildings may be the most obvious benefits of cultural tourism on local communities. But they may not be the most important. Indeed, the most significant quality-of-life benefit made derives from the role cultural tourism plays in nation building and developing, enhancing, and changing national identity, creating a sense of shared history while providing an outlet for contested histories to be aired and ultimately fostering a sense of

belonging among both citizens and the Diaspora of a country. du Cros (2004:154) notes that national identity is built on the cultural identity of a nation-state and expressed through symbols and discourses as a symbolic guide map to determine the meaning and significance of nationhood for a society.

Through the emphasis on preserving heritage for targeting cultural tourists, local residents gain the chance to understand their culture and therefore local identity better. Palmer (1999) has written extensively on the relationship between tourism and symbols of national identity. She argues that heritage tourism is a powerful force in the construction and maintenance of national identities because it relies on the symbols of the nation as a means of attracting visitors. Cultural tourism, therefore, reinforces and enhances national pride, with cultural tourism attractions, in particular, creating an awareness of the foundations on national identity are built. As she comments, (Palmer 1999:318) “sites such as museums, historic theme parks or attractions, offer individuals an opportunity to reaffirm a sense of belonging. These heritage attractions enable visitors to ‘tap-into’ the national vein of identity, to remind themselves of the core components of nationhood in a playful and exciting setting.” Additionally, communities with even the most tenuous ties to nation building can foster that sense of belonging as attested to by the almost 150 place markers that state “George Washington slept here” (HMDB 2010).

The creation, formation, or reaffirmation of national myths plays a central role in this process, for the desire to consume these myths provides the foundation of the appeal of many places to both a domestic and an international audience. Aboriginality and the “Outback,” for example, are part of the core Australian national cultural mythology (Altman 1989; Brown 1999), explaining to a large degree why some people liken a visit to Uluru in central Australia a secular pilgrimage, with the climb portrayed as the ultimate test of faith (Horne 1989). For domestic tourists, such an act reaffirms their personal attachment to nation, while international tourists may affirm a spiritual connection to a shared real or aspirational historical past.

Moreover, cultural tourism is playing an increasingly important role in creating new national myths in postcolonial states, including Eastern European countries since the fall of communism (Bossen 2000; Hughes and Allen 2003). du Cros (2004) writes about how the Central Government in China recreated the myth of Hong Kong in the immediate aftermath of its handover back to China, with the intent of reasserting its deep connection to China and, in doing so, relegating its 150-year British colonial past to an afterthought. It did so in part by dedicating an entire museum in a popular tourist node to the display of archaeological artifacts excavated on one of Hong Kong’s counter islands. The commentary associated with this display hailed it as being one of China’s ten most significant archaeological finds because it reflected a “profound tie with mainland China dating back almost 6000 years” and also because it was “an example of a successful joint excavation with mainland Chinese archaeologists.”

Anyone who has visited Robben Island off the coast of Cape Town, South Africa, is also a witness to national mythmaking in progress. Robben Island was declared a World Heritage Area in 1999, as a symbol of the triumph of the human spirit, of freedom, and of democracy over oppression. It was a maximum security prison for political prisoners during the Apartheid period. Nelson Mandela was imprisoned there for 27 years. With the fall of Apartheid, the Island gained a central place in the myth of the new South Africa. Nelson Mandela’s cell has become a secular shrine, and former political inmates offer a revisionist history of their time spent in the prison and their role in the liberation of South Africa. Instead of being portrayed as Marxist terrorists, as they were by the former government, they now say they were nation builders who kept the flames of democracy alive during their incarceration.

National mythmaking and nation building are controversial ideas, though, for history is rarely uncontested. Whose history to present, how to present that history, and what stories to tell are key considerations, especially in countries populated by immigrants or with a deeply contested multi-racial past (Boswell 2005; Chang 2000; Conforti 1996; Santos et al. 2008). Boswell (2005) warns

of the increasing desire in postcolonial societies to reflect a common group history as a means of promoting a supposedly more authentic account of the past. But, as Conforti (1996:830) comments:

America's history, like that of most nations, has not been neat and simple - while it has included events and achievements of which any nation would be proud, Americans often must look back with shame and embarrassment - making the selection of what to preserve difficult. The racial diversity of America emphatically illustrates intertwined pride and shame. While most people already know of George Washington and Abraham Lincoln, fewer know of Sojourner Truth or John Brown. If Plymouth Rock is significant to America's founding in terms of one group, so is Wounded Knee in terms of another. While Independence Hall and Faneuil Hall would certainly have to be preserved, what of the concentration camps where California's Japanese-Americans were interned during World War II?

Yet, cultural tourism also provides some opportunity for contested histories to be shared or for the culture of ethnic minority groups to be highlighted. Contested sites, such as Little Big Horn or the Plains of Abraham in Quebec, provide venues for alternate histories to compete. Cultural festivals and the opportunity to consume ethnic minority cultural experiences have played an important role in conserving ethnic neighborhoods and also in constructing positive images of the residents of these neighborhoods (Chang 2000; Conforti 1996; Santos et al. 2008).

Community Well-Being and Connection to Place

Much has been written about how tourism can act as a vehicle to maintain or revitalize traditions and local culture (Bachleitner and Zins 1999). Ashley et al. (2000), for example, comment that tourism can increase the value attributed to minority cultures by national policymakers, while Yang and Wall (2009) note that tourism may provide a vehicle for ethnic groups to promote themselves, their histories, and their culture to others. The range of products that can achieve this outcome includes literary attractions (Fawcett and Cormack 2001; Squire 1996), local museums (Harrison 1997; Prideaux and Kininmont 1999), craft markets (Hovinen 1995), purpose-built attractions (Hou et al. 2005; McIntosh and Prentice 1999; McKercher 2001), and historical precincts and cities (Jansen-Verbeke 1998; Teo and Yeoh 1997).

Besculides et al. (2002) further discuss how presenting one's culture to others can enhance the idea of what it means to live in a community, be part of a community, and take pride in that community. Festivals and events, in particular, play a prominent role here, for they are cooperative activities that involve much of the local community in the planning and delivery of the activity (Gursoy et al. 2004) while building partnerships among disparate stakeholders (MacDonald and Joliffe 2003; Anon 2003). In the process of developing the festivals, community cohesion and participation can also be fostered. Community involvement in tourism planning is advocated for the benefits of the residents (Howie 2003). Active participation of locals is imperative as the asset owners may ensure this group of important stakeholder can influence the future development of their locality. Gibson and Davidson (2004) discuss how the Tamworth Music Festival in Australia has played a key role in developing both a sense of place identity and rural pride among residents, to the extent that the community has established itself as a core part of Australia's traditional rural identity. Felsenstein and Fleischer (2003) wrote about how festivals can help create an image of a place that extends beyond its local area. Richards and Wilson (2004) note how Rotterdam's staging of the "Cultural Capital of Europe Festival" improved its image among residents and stimulated urban development. Prentice and Andersen (2003) discuss how the Edinburgh Festival has positioned the city positively as a creative place that has both made Scotland seem more sophisticated and engendered a sense of pride amongst local residents. De Bres and Davis (2001) studied the "Rollin' Down the River Festival" involving more than 20 communities located along a 130-mile-long stretch of the Kansas River in the US Midwest. They observed that this festival produced a positive self-identification for the communities involved that outweighed its economic benefits.

Interestingly, connection to place does not have to be limited to the local community. People construct connections to a place by creating verbal accounts of their visits that position the activities being normal and ordinary (McCabe and Stokoe 2004). In doing so, the sense of attachment can be extended to communities that lie well outside of the local area. On the one hand, countries that were major sources of emigration have promoted inbound “roots” tourism to former residents and their descendants. Ireland and Ghana have invested heavily in targeting primarily at the American market. Parts of southern China are also discovering the Diaspora market, as discussed in Case 2.

Alternately, immigrants have also striven to maintain ties to the “old country” through a number of ethnically themed festivals and events. Scottish Highland games are one of the more popular examples. Chhabra et al. (2003) studied one such event held in North Carolina and discovered a high level of perceived authenticity, even though people knew that they were physically located along way from their real cultural origins. The games helped visitors, many of who came dressed in kilts representing their clan tartans, to embrace folkloric traditions, arts and crafts and ethnic history, social customs, and cultural celebrations.

Case 2 Kaiping Diaolou – Reestablishing Ties with the Chinese Diaspora

The southern part of China’s Guangdong province focused around the counties of Kaiping, Enping, Taishan, and Xinhui was a major source of Chinese emigration to North America, Europe, and Oceania in the late 1800s and early 1900s. In those days, most receiving countries had restrictive, anti-Chinese legislation designed to limit the number of Chinese migrants. Men were allowed to emigrate as laborers, while women and children were not permitted to join them. The breakdown in social order in China following the collapse of the Ming Dynasty resulted in a period of lawlessness and banditry. The old men, women, and children left behind in these communities were an especially vulnerable target. According to local histories, between 1912 and 1930, more than 70 major episodes of banditry and kidnapping were recorded in the Kaiping area with more than 100 people killed. In response, overseas Chinese and affluent returned migrants constructed over 1800 Diaolou, or fortified houses or communal buildings, where people could flee if attacked (see pictures). Four groups of Diaolou and 20 symbolic structures were inscribed on the world heritage list in 2007.



(Photograph by the authors.)

(continued)

Case 2 (continued)

This migrant population set the groundwork for the establishment of vibrant Chinese Diaspora communities throughout the world. Many of their descendents now wish to reconnect with their cultural roots. They have provided financial support for the development of interpretation centers and are visiting in increasing numbers.

The Chinese Diaspora is the focal point of the interpretation center found in Zili Village. The center highlights the history of emigration from this area and also proudly identifies descendents who have had success in the Western world.

Having been inscribed in the UNESCO World Heritage List, the Diaolou are now popular tourist sites which also provide an opportunity for overseas Chinese to reconnect to their roots. Cultural tourism has, therefore, benefited “communities” at a number of scales. It has provided the rationale to conserve these unique buildings and is generating local employment opportunities. Equally as importantly, though, it has also provided an opportunity for the Chinese Diaspora who has been cut off from China for up to 80 years to reconnect to their cultural roots.

Provision of Leisure and Recreation Facilities

Finally, cultural tourism provides the catalyst for the development of a range of leisure and recreation facilities that can serve local as well as international audiences. Much has been written about this topic, and as such, need not be discussed in detail here. Indeed, the multifunctionality of heritage attractions is one of their great strengths. Ostensibly, they may be built for tourists, but often the local community represents the dominant user group (Caffyn and Lutz 1999; Chang 2000; Harrison 1997; Teo and Yeoh 1997). Hughes (1998), for example, illustrates that the majority of people who attended the theater in London were not residents of the city. Singapore’s Little India plays three different roles for local shopkeepers, Singaporeans, and tourists as described in Chang (2000). Conforti (1996), discussing Little Italy in New York, notes that a conscious effort has been made to preserve the ambience of the ghetto and to maintain the sense of Little Italy long after it has ceased being a residential neighborhood for Italian immigrants or their descendents. It, therefore, serves as a visual reminder of the past while offering a popular contemporary dining atmosphere for others. Case 3 illustrates how the conservation of a historic community on the basis of its potential as a tourist attraction provides far more benefits to the neighborhood and urban community.

Case 3 Sam Tung Uk Folk Museum – A “Local” Tourist Attraction

Sam Tung Uk Museum is one of the oldest and best-preserved Hakka walled villages in Hong Kong. Built in 1786 by the Chan clan, it declared a monument in 1981 and simultaneously converted into a museum. The walled village represents a classic example of geomantic village design that adheres to the principles of Feng Shui. It includes two rows of side houses, an ancestral hall, and four period houses. The village now is located in the center of a suburban residential district that was the focal point of Hong Kong’s industrial revolution in the 1960s. The museum tells the story of the village and its environs as it

(continued)

Case 3 (continued)

evolves through its eighteenth century agricultural roots to nascent urbanization in the early twentieth century, industrialization, and its current status as a high-density metal suburb. The Hong Kong Tourism Board describes it as providing an authentic and fascinating insight into the lifestyles of villagers in the New Territories before modern development completely transformed this once entirely rural area.



(Photograph by the authors.)

Relatively few tourists visit. Instead, school groups and the local community represent the dominant user groups. School groups visit to learn about local history, agriculture, and urban development, while the local community visits more to learn about their roots. Moreover, the displays and interpretation are designed with the local community in mind.



(Photograph by the authors.)

(continued)

Case 3 (continued)

Sam Tung Uk represents an example where tourism as the justification, in part, to conserve a historic building has provided a valuable heritage asset primarily for the benefit of the local community. It serves as an excellent education center for locals and provides them with an extra leisure opportunity as well as a place to learn about their own community.

Conclusion

The literature on tourism's impact on local communities has evolved significantly over the past number of years, from anecdotal stories stressing its benefits only, to superficial accounts documenting alleged costs to a contemporary studies that recognize both benefits and costs may accrue, depending on how well cultural tourism is managed (Nash and Smith 1991). Responsible tourism development, therefore, needs to articulate a vision as to how tourism fits into and contributes to community life (Ho and McKercher 2005; Haywood 1988). As a result, culture cannot be exploited for the sake of tourism development if such exploitation brings with it unacceptable costs (Ho and McKercher 2005; Tosun 2002).

This chapter examined how cultural tourism can enhance the quality-of-life of the diverse sets of communities it touches, providing it is developed in a sympathetic and socially, culturally, and ecologically sustainable manner. The chapter was framed within the context that successful cultural tourism involves achieving an optimal mix of tourism and non-tourism objectives. In doing so, benefits to tourists will accrue while enhancing community quality-of-life in a number of ways. Much of the literature has focused on the economic benefits of cultural tourism, either in revenue generation or by providing a rationale for the conservation and adaptive reuse of historic buildings. The authors recognize these benefits, but the paper argued that even greater "soft" quality-of-life benefits accrue through nation building and national mythmaking, community well-being, and the provision of a range of leisure and recreation opportunities for the local community. The authors also recognize that the concept of community can exist at different spatial scale levels, from the neighborhood to the global community. As a result, the quality-of-life benefits of cultural tourism can also occur at different spatial scales.

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Chapter 21

Heritage, Tourism and Quality-of-Life

Gregory J. Ashworth and John E. Tunbridge

The Elements of the Argument

This chapter explores the relationship between three phenomena, namely, heritage as a process and outcome, tourism as an activity and quality-of-life as a condition or state of being. The purpose of this exploration is not only to demarcate the area of overlap between the three but also to establish the existence of causal links. Such links may have two important policy consequences. First, understanding cause and effect allows an appreciation of the impacts of changes in one variable upon the others, whether intentional and beneficial or not. Secondly, the possibility is raised of deliberate intervention by acting upon one element with the intent of changing another, most obviously here using heritage expressed in this case through tourism, to enhance the quality-of-life experienced by all concerned, most of all perhaps the host society.

It should be admitted at the outset that our concern encompasses only a part, and not the most important part, of each of the three phenomena. Heritage has many contemporary uses of which its commodification for tourist consumption is just one.

Tourism encompasses a wide range of activities many of which make no use of heritage as a resource. The quality-of-life of individuals depends on many variables in addition to those considered here.

The common ground between the three otherwise quite different phenomena is identity. It is this identification of people with places that powers both residents' attachment to place and a place-specific tourism. Thus our argument is founded upon three propositions, each disputable, and each to be explored here. First, one outcome and indeed often self-conscious objective of heritage is the creation of distinctive places with which people, whether tourists or residents, may identify. Secondly, some selected aspects of this distinctiveness are commodifiable as tourism products providing satisfying tourism experiences. Thirdly, a major component of quality-of-life, for residents and at least temporarily for tourists, is an awareness of an individual and collective identity much of which is derived from a sense of place. For tourists, recollection of this

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identity may lead (as destination marketers hope) to repeated visits, enduring place attachment and periodic or even permanent retirement residence, this being perhaps the ultimate combined tourist-resident quality-of-life outcome of heritage tourism.

The Terms

The principal terms used in the argument need careful delineation.

Heritage

Heritage is treated here not as a preserved artefact or monumentalised relic of the past or remembered historical association or event. It is seen not so much as a resource but as a process and an outcome. It is a process whereby the present selects from the past in response to various contemporary needs. It is not a concern for the past as such, let alone any doomed attempt to preserve or recreate a past: it is selected elements of the past in the present and to an extent in the future imbued with the idea of continuity and bequest. As such it is inevitably plural in the sense that different people will make different selections and create different heritages, and also mutable as contemporary needs change. It is also an outcome, albeit continuously evolving, in so far as it shapes environments.

Tourism

Tourism is an activity with two characteristics important in this argument. First, it is a discretionary activity, which endows it with considerable freedom of choice as to where or indeed whenever it is engaged in. Second, insofar as it is place-specific, it is a form of consumption of place products that necessarily involves the spatial displacement of people. This temporary migration has the important consequence that it leads to the coexistence in the same place of essentially two groups of people who are assumed to be different in certain fundamental characteristics, namely, tourists/visitors/guests and residents/locals/hosts. Each is assumed to be differently motivated, differently behaved and differently benefited.

Quality-of-Life

Being the theme of this book, the term 'quality-of-life' has already been defined and elaborated. Suffice it here to stress that it concerns us as it derives from a particular quality or condition of the environment. It has to be admitted at the outset that the contribution of a heritage-induced place identity to individual and collective well-being and thus to quality-of-life, although it undoubtedly exists, is likely to be in most cases relatively minor compared with other more basic contributions. The satisfaction of human needs of sustenance, health, shelter, security and even community take precedence over any possible contribution of heritage-induced place identities. However in affluent societies these basics are too often taken for granted, which may well enhance the perceived significance of heritage identity to quality-of-life.

Throughout we use two basic dichotomies, even if the boundaries between them become somewhat blurred, namely, the individual and the collective, and the resident and the tourist.

Tourism and quality-of-life is a wider issue than conventionally understood. Tourism involves residents, visitors and those collaterally involved, from active facilitators to passive co-users of the

regional/global environment. Our concern is however with the heritage objective within tourism, and is thus focused upon its quality-of-life significance for residents and tourists. People collaterally involved are not directly affected by the heritage motivator of tourism but are nevertheless influenced by the volume, direction and by-products of its flow and are accordingly not to be overlooked in the final analysis of heritage tourism's quality-of-life implications.

Identity/Place Identity

The component binding these three very diverse terms together is identity. Identity has two apparently contradictory meanings. It may be a quality of uniqueness that sets something or somebody apart. However it may also be the result of a process of identification whereby somebody identifies with or something is identical with something else. Identity can thus stress either distinctiveness or similitude. Identity and place identity are not synonyms: the latter being a subcategory or special manifestation of the former (Ashworth and Graham 2005). People may use specific locations to articulate or exhibit their identification with social and cultural groups. The group may even be demarcated by physical spatial coordinates. The most obvious case is the collectively imagined phenomenon 'nation' and its ostensible reflection in the physically bounded entity 'state'. Indeed it is this identification by people that transforms space (a geometric form) into place (a cultural construction).

It may also be necessary to point out that in the term 'sense of place', it is not the place that is sentient but the people. A sense of place is not an intrinsic quality of a physical location waiting to be recognised and appreciated by people, although much official policy seems predicated upon this idea and treats place identity as if it was a dormant mineral resource endowment needing only discovery and activation. It is a dynamic process whereby people endow locations with the attribute of distinctiveness through identifying with, or indeed against, them. An important consequence of this is that place identity is not an immutable, universal condition. If it is the people who do the identifying, then clearly different people are likely to identify differently with the same locations, and moreover, place identities will change as succeeding generations exercise their imagination differently.

Two further attributes of place identity need mentioning. People as individuals identify with places significant to them. The concept of a collective place identity implies an aggregation of such a palimpsest of significant localities to create a common collective place identity, which raises many of the same issues as the idea of collective memory or indeed collective heritage. Such a scaling up raises the question of whether this transformation from the individual to the collective is just a summation of the many individual places or something quite different. Most of the assumed benefits of place identities accrue to collectivities and contribute to collective attributes such as social cohesion or political allegiance rather than to the individual who may receive little or no automatic individual benefit. Second, the existence of a hierarchy of spatial scales is an intrinsic quality of places. There is no inherent contradiction in simultaneously identifying with places at a series of scales ranging in size from the single individual to the largest collective entity imaginable, humanity. This 'Russian doll model' of nesting hierarchically related identities (Ashworth and Howard 2000) may be a source of conflict or of harmony, but it is quite intrinsic to the idea of place and in continual need of management.

The Relationships Between the Elements

In endeavouring to relate the elements together, the assumption here is that place is the resource, heritage the instrument and place identity the outcome. However there are two further complications. Once these links have been established, the next and most tendentious step is to relate place

identity to quality-of-life. Second, quality-of-life is not a general condition pertaining to places, like the weather; it is an experience of people. In this case, people are essentially (if imprecisely) divided into the two discrete categories of tourist/visitor/outsider, on the one hand, and resident/local/insider, on the other.

Heritage and Place Identity

The link between heritage and place identity depends upon the premise that the history that occurred at a place is necessarily unique to that place (it did not occur elsewhere); therefore the transformation of its relict structures, past personalities, events and narratives into heritage will shape a uniqueness, differentiating this place, including the people who identify with it, from any other place or people. It is this, usually implicit, idea that drives many, if not most, local policy initiatives for creating heritage places whether intended in the first instance for tourists, in search of a distinct tourism experience, or local residents.

However heritage as an instrument in place-making has ambivalent and often unintended outcomes. Heritage is often deliberately invoked as a local counterpoise to a feared globalisation of cultures and thus place identities. Place heterogeneity is sought through the enhancing of a local place-bound vernacular to counter a perceived threat of a homogenisation of places. Governments at national or local levels have instituted many policies to deliberately discover and then support a sense of local identity. The Dutch 'Belvedere' programme, which ran from 1999 to 2009, was specifically designed to identify distinctive local regions and cities in the Netherlands and encourage the enhancement and promotion of such entities (Ashworth and Kuipers 2002); likewise Canadian provinces have distinguished tourism regions, based largely in fact upon very similar resources, in Quebec bearing heritage designations (such as Estrie, Mauricie and even Beauce) suggestive of French-style *pays*. However the process of heritagisation, through which selected aspects of the past are re-presented for contemporary consumption, is itself a part of the very globalisation it is being recruited to oppose. The global demand for heritage is being met by global investment and development corporations, and even when applied locally by local agencies, tends to replicate global forms, terminology, approaches and outcomes.

The result is more complex and often far from what was intended. The local vernacular, in style, materials, traditions, designs and rituals, may itself become globalised, through an increased global awareness encouraged by international tourism. The very distinctiveness becomes an international attraction to be exported. The pizza was until quite recently a local identifier of Tuscany, paella of Valencia. However the local vernacular was globalised and is now consumed everywhere. The local has become global and thereby uprooted from locality. Tourism plays a major role in this process in both seeking out the local and distinctive and then exporting it for global consumption (Ashworth and Tunbridge 2003).

Tourism and Place Identity

As mentioned earlier, by no means are all tourists in search of distinctive place identities. Many are not. Seaside and many types of activity tourists, winter sports for example, are certainly concerned with some local characteristics of weather or topography, but the culturally place-specific locations of these qualities may have little or no significance. If the beach or the *piste* fulfils the quality criteria, the tourist may not care about its national location or cultural context. This being admitted, our concern is upon those types of tourism that are place-specific; that is where the

place itself, its distinctive attributes and characteristics, is the tourism product that is promoted, sought and experienced. Tourists who have chosen to visit Paris for what is expected to be a 'Paris experience' would be disappointed to find themselves instead in London and vice versa; globalisation has yet to eradicate all their distinctive qualities.

As argued above, heritage as a deliberate contemporary collective creation is the main, but not sole, instrument for shaping this place specificity for tourism markets. However, the important question now is: if places are cultural constructs created by their users, then do residents and tourists create and inhabit the same or different places, and what are the implications of this? There are three broad positions that can be argued here: first, that it is the same place that is being consumed, second and contradictorily, that two different parallel coterminous places are being experienced, and third, that the place is a joint creation of tourists and residents resulting from their interaction. Each of these positions has implicit consequences not least for the management of places.

The first argument is that locals create places, which then may prove attractive to visitors who may come to consume this local product created by and for others. Tourism in this model is a marginal 'windfall' demand with the tourist being attracted by, and consuming, a place identity created by the residents for their purposes. If this is the case, then tourists and residents are consuming the same place and consequently the possibility of competition for a limited resource exists. If tourism is seen as playing this marginal role, then it may be welcomed if there is an oversupply of the product and a surplus capacity of resources, but it will be only tolerated for so long as there is no diminution or damage of the resource or crowding out of the 'real' priority users.

A second argument would point out that tourists create their own places in response to their own needs, which by definition of the tourism activity are different from those of the residents. Two places exist, the residents' and the tourists' place, albeit in overlapping space. In this case, policies for coexistence will depend upon market segmentation and separation, often with different place images being projected to locals and to visitors and different policies in the different places.

However, a third argument would allow both residents and tourists to participate in the same place-making process. Here the place identities intended for local internal use and those projected for external consumption are assumed to be not completely separate but tending to interact through time. The nature of the tourism experience guarantees that place-product commodification and imaging cannot be separated in a perfectly segmented market with insiders and outsiders consuming different products in ignorance of each other. A local may not recognise the distinctive attributes of the place until the arrival of the tourist to experience these as there is no comparative context for such recognition. It is the tourist who legitimates by their visit and draws the attention of the resident to the distinctiveness of the place. The resident will tend to begin to see themselves and their place in the way that it is seen by outsiders and projected to them. This is a dynamic, not a static, situation and there is no end-state. Place-specific tourism has a need to constantly extend the product with new experiences in order to satisfy the voracious and fickle demands of the tourist for novelty, if only to maintain market share in a highly competitive market.

The idea of the coexistence of the authentic local place and the inauthentic tourist experience of it is untenable as the tourist engages in a restless search for the real place; tourism agencies extend and widen their place product to maintain their unique competitive advantage, while the self-image of the locals responds. In particular, successive generations of residents may accept the heritage extensions in vogue during their formative years as the point of departure for their own circumstantial mutations of self-image. The result is a reiterative interactive process between residents and tourists with each both contributing to and receiving from the place-making process, diverging and converging in a *perpetuum mobile*, shaping and reshaping a creolised place identity.

We contend that the third argument correctly identifies the typical scenario, *ceteris paribus*. Any overlap between residents and tourists, as identified earlier, would naturally intensify this interactive process. However, in the diversity of the real world, the arguments are not necessarily in conflict. One or another may more accurately recognise the condition of particular places at particular times; for example, in some postcolonial scenarios residents' and tourists' place identities may constitute two mutually antagonistic solitudes, notably where religious dissonances are implicated (Tunbridge and Ashworth 1996). This leads us to the following heritage discussion.

Tourism and Heritage

A very similar argument to the above discussion on who makes places, and derived from it, is summarised in the question, 'whose heritage is it?', and its corollary, 'who owns the past?', that is, who has the right to use a place-specific past in the creation, promotion and management of heritages. A frequently encountered, although often implicit, answer to this question, with many implications for management policy, depends upon what can be termed an industrial production model. Heritage products are produced in one place by locals generally to satisfy their own demands. Tourists appear to be travelling to consume someone else's heritage in someone else's place.

The implications of this assumption are that tourists are marginal users, permitted under a number of conditions deriving from that marginality. They must not damage, deplete or alter the heritage nor crowd out, displace or inconvenience the prioritised 'owners' of the heritage, the locals. It is assumed that the tourist experience of local heritage is short and superficial, being founded on a lack of time, knowledge, background and sensitivity. It is simplified and sanitised, lacking depth and context, being reduced to snippets quickly and easily consumed. Locals by contrast are assumed to have the time, knowledge and context to appreciate their own heritage. Therefore selection must be determined by the insiders even if consumed by outsiders. In the 'Seoul Declaration' of ICOMOS (2005) on the management of tourists in Asian historic towns, stressing the 'importance of accurate and aesthetic interpretation and presentation of heritage places for tourism', there is no doubt who is supposed to be the correct arbiter of such accuracy and aesthetics.

Similarly in such an industrial model, the relict artefacts and associations play the role of resource in the production of heritage products. These resources are assumed to exist in fixed nonrenewable supply. The tourist is thus viewed as competing with the resident, and in such competition the latter must be prioritised as the rightful owner, and the former, permitted only under appropriate restrictions if not in extreme cases excluded altogether to prevent a depletion or even exhaustion of the resource. The Seoul Declaration quoted above also reiterates this view of heritage resources: 'tourism sector representatives must work with conservation authorities to establish ways to achieve sustainable tourism without exhausting non-renewable cultural resources such as heritage'. This view looms large in the management of World Heritage sites, particularly in fragile conditions of recent social stress in 'Third World' cases such as Angkor (see, e.g. Gillespie 2009).

Not only should tourists consume what locals have selected, and in the quantity locally determined, even their behaviour, how they consume the heritage, should be managed in accordance with locally established norms. It is implicitly assumed that tourists are engaged in entertainment using discretionary time and money, motivated by curiosity and the idle pursuit of pleasure. They compete with locals who use heritage for more serious and socially beneficial educational, aesthetic or spiritual reasons. In addition, not only are their motives questionable, but also potentially is their behaviour, because they are freed while on holiday from the social

and cultural constraints of their home society, having a propensity to behave in their use of heritage in ways that give offence to locals with more legitimate and appropriate motives. Thus the dress, demeanour and behaviour of tourists consuming heritage should be regulated and controlled through norms imposed by the owners and legitimate consumers, the locals: hence, the devising and imposing of 'behavioural codes' (Roowaan 2005), and 'responsible tourism codes' (Mally and Fennel 1998) within the wider idea of 'ethical travel' (Pattullo 2006).

However, all of the above assumptions are challenged by the definition of heritage as a creation of the user. If in theory you cannot consume someone else's heritage, then tourists create and consume their own heritage: they do not appropriate the heritage of the locals. This would appear to be contradicted by the numerous attempts worldwide of places to market 'their' heritage to visitors or even by tourists seemingly motivated to travel to experience someone else's heritage and exotic culture. Closer inspection however reveals that what is actually happening is that tourists bring with them their existing heritage constructs, shaped from their own previous experiences, within which they incorporate such elements of the new experience as may conform to these and conversely fail to incorporate elements that are just too different and exotic to be integrated. They are creating and consuming a version, possibly enhanced and extended, of their own heritage but doing so somewhere else. This may be recognised by local marketing agencies in the 'somewhere else', particularly where they represent small destinations heavily dependent upon large and historically dominant neighbours; thus Bermuda extensively sells reflections of US heritages to American tourists (Ashworth and Tunbridge 2000).

From this stems the idea that tourist heritage is different but not necessarily inferior and that tourists are not consuming an inherently poorer derivative version of the heritage selected by residents for themselves. This has contradictory implications for the assumptions argued above about heritage selection, resource use, motivation and behaviour.

It is sometimes argued that tourists by virtue of being temporarily present outsiders consume a version of heritage that is shallow, partial and even false, while locals consume the version that is profound, complete and correct. This again stems from a confusion of heritage with history. History may well require an authenticity of the object or of the historical record, but heritage recognises only the authenticity of the experience as perceived by the user. Of course a heritage experience may be well or badly presented, relevant or irrelevant to the consumer, and effectively or ineffectively communicated. It cannot however be intrinsically less commendable or even wrong by virtue of its creators being outsiders.

Even the charge of the superficiality of the visitor can be challenged. Heritage tourism is an amalgam of very diverse special interests, and often it is the tourist who has the deeper, more specialised knowledge, often in a global comparative context, and who discovers and rediscovers local heritages unknown or unappreciated by the locals themselves. Far from the visitor consuming the already prepared heritage of the locals, it may actually work the other way around. As with place identity, the locals may be unaware of the significance of aspects of their heritage, regarding it as just normal and mundane; it is the tourist's appreciation that 'discovers' this new heritage, which is then adopted by the locals as their own. Residents, as argued above in the place identity 'creolisation' model, may shape their own self-image using their reflections in the eyes or camera lens of the tourists. Indeed heritage perceptions have often been tourist-led in this way since the beginnings of Western tourism in the eighteenth-century Grand Tour (Trease 1991) or even the medieval pilgrimage (Timothy 1996).

Also, the charge that tourists may damage or deplete heritage is based on the misunderstanding that heritage is in fixed supply and that the quantity of heritage objects, buildings and spaces is limited and nonrenewable (Ashworth 2009). This may very well be the case for specific artefacts and relics derived from archaeology or historical architecture but not for their interpretation and packaging. Heritage is a product of a limitless human imagination, which can be constructed as required from the resource of the imagined past that is ubiquitous. Physical space

is of course finite, but the obvious solution to overuse or overcrowding is to create more sites, for which many precedents exist, for example, Weimar's temporary duplicate of Goethe's Garden House (Ashworth and Tunbridge 2000). Shortage, depletion or overuse is a temporary consequence of a failure of supply, not an excess of demand. Of course competition and even conflict may occur in practice, but not because the product is inherently finite, rather because heritage resources and sites are frequently, even generally, multi-used contributing to a variety of heritage products in response to a variety of contemporary needs.

It follows that the motives of visitors and locals, and consequent expected behaviour, cannot be compared and then prioritised through a simple moral dichotomy. The assumption that the locals are more commendably motivated by educational or cultural objectives and undergo a more worthy, aesthetically fulfilling and acceptable heritage experience than the pleasure seeking tourists, who experience only superficial entertainment, is not generally sustainable. The policies based on this assumption are similarly untenable.

Place Identity and Quality-of-Life

Places thus may express and enhance senses of belonging to a group, or equally of course a sense of alienation and separation. While this certainly occurs, it can be questioned whether feelings of identification with specific places is a universal basic human need and if such individual requirements can be aggregated to form a collective need. There is an underlying, usually implicit assumption that the existence of a distinctive, clear place identity is, if not an absolute necessity for individual stability or fulfilment, at least a means of conveying feelings of satisfaction, pleasure and well-being. Places are thus assumed to contribute some sentiments, as psychic returns to the individual that are positive if they identify with the place or indeed negative if they identify against it. Again it is assumed that these individual returns can be aggregated into some collective group profit or loss, which may be social or economic. Certainly a lack of a sense of personal place identity may well be a cause of psychological disturbance in the individual, but if this idea is extended to the collective identification with places, then does the socio-psychological dislocation continue or then is this collective identification, like collective memory, no more than a partially illuminating supposition with no physiological basis.

This may be no more than a place fetishism that overestimates the extent and need for an identification of people with places. Much identification with social, cultural and political groups has little or no need of place: most aspects of human identity are not specially place-bound. This is Webber's (1963) 'community without propinquity'. It may even be the case in a world of increasing mobility and intercommunication that an identification with a locality is far from being a universal basic human need; it may be no more than a preoccupation of an unusually place-bound minority who for some reason have been bypassed by the wider social trends.

Even at the individual level, there can be many instances where a 'placelessness', to use the expression introduced and elaborated by Relph (1976), is to be preferred over a place which has qualities of uniqueness and distinctiveness. There are many circumstances where sameness, the absence of distinctive places, rather than difference conveys a reassuring familiarity and thus eases functional efficiency. The uniquely local is sacrificed for the universally familiar. In many travel situations the global sameness of transport terminals, accommodation provision and many mundane but necessary aspects of everyday life delivers practical advantages as well as reassurance. Indeed these positive qualities of sameness may be sought on the same trip as those of difference, if trade-offs of time and preference are required.

Tourists are in fact notoriously ambivalent in this respect, combining a paradoxical mix of the excitement of the exploration of the unfamiliar, the essential motive for heritage tourism in the

first instance, and the reliance on the reassuringly familiar. The extreme is expressed in the novel *'the accidental tourist'* (Tyler 1985), where a fictional guidebook is written for involuntary travellers who seek only an as exact as possible replication of their well-known home environments and as little as possible intrusion of the foreign and unknown into their lives.

The sameness of facilities, spatial patterns of location, social behavioural conventions and cultural attributes removes much of the stress implicit in migration, whether short term as in tourism or more long term as with residents. Even for residents, homogeneous generic places are often to be preferred over heterogeneous distinctive ones. For example, much scorn has been poured upon the lacklustre, featureless sameness of shopping malls, high streets, industrial estates and above all residential suburbs. Folk singer Pete Seager sang (1964) scornfully of:

*'Little boxes on the hillside,
Each one made of ticky tacky
Little boxes, little boxes
Little boxes, all the same'*

(written by Malvina Reynolds).

The sameness was not simply an unfortunate consequence of the economics of mass production; it was actually the intention of both builders and residents, allowing mobile populations to adjust to new places faster and more easily and to settle into societies and environments that were familiar wherever they might be located. The 'identity dividend' has been traded for an easy familiarity. Although such suburbs were not confined to North America, it should be remembered that North American populations demonstrate much higher rates of employment and residential change than European populations, which may explain some of the featureless characteristics of North American cities often caricatured, especially by Europeans, as 'geographies of nowhere' (Kunstler 1993). More accurately, such places are not nowhere, as anywhere becomes everywhere rather than somewhere.

The New Towns, created in Europe by national governments after 1948, attempted to counter feelings of placelessness induced by the necessary mass production of buildings and layouts, an uprooted population and the absence of a local past from which heritage identities could be shaped. Neighbourhood scale design features and place marketing campaigns directed primarily at the resident population were used to enhance city image and distinguish localities.

It is a truism to point out that improved communication has made space less significant, but has it also reduced the importance of place? Webber (1964) concluded that 'accessibility freed from propinquity' resulted in the 'non-place urban realm', which was not devoid of communities, there were many, but these had no need of rooting in a spatial context. However it can be argued that this creation of featureless geography, devoid of locality, provoked as reaction an increased awareness of the importance of locality and motivated governments to introduce policies designed to enhance localism. As in the field of heritage, where it has long been argued that it was the very acceleration of the pace of change and its destructive consequences beginning in the nineteenth century that provoked the converse idea of preservation (Ashworth and Tunbridge 1990), so local identity and the identification of community with locality have become a popular pursuit of governments and so-motivated commercial interests just when it is ceasing to matter or has, in many instances, largely already disappeared. In addition there is a misgiving in some observers that this locality will be created from local history, raising the possibility of creating an identity based upon social and cultural elements that are already obsolete and largely irrelevant to the daily way of life of most locals and thus of fossilising past or present social patterns in a way that may inhibit future change.

There is a serious charge (made among others by Hewison 1987) that localism, like heritage, is just a backwards-looking nostalgia, literally an expression of pain for what has already been irretrievably lost, and a flight to a refuge in the past and in the locality as an alternative to facing the global challenges of the present and future.

However, lack of need for place identification in a mobile society does not preclude pleasure in identification and repeated association with a variety of places. This pleasure may be fundamental to tourists' quality-of-life, in the mind's eye as well as in the travel experience itself. Tourism marketers who can inculcate such quality-of-life place associations have surely found the Holy Grail of their vocation. The fashion for consumption of local produce, promoted (rather indiscriminately) on grounds of sustainable environments and tourism by such august bodies as the British National Trusts, is one current instrument to this end, for residents and tourists alike; so too for tourists is the closely associated bed-and-breakfast accommodation movement. While many tourists regularly or circumstantially prefer anonymous or even placeless amenities, as we discussed above, it is readily apparent that for some the 'local' options are instruments of place attachment conducive to quality-of-life.

Reaping the Identity Dividend and Raising the Quality-of-Life

There is nothing new about an academic interest in sense of place. The task of discovering the existence of idiosyncratic places, a world divided into distinct regions, has always been a central concern of human geography. The conviction that such identities are created and recreated by the actions of people is also not new. What is new, however, is the increasing interest of official government agencies at various levels in this topic, the addition of place identity shaping as a legitimate and feasible task of government operating in the collective interest and the expectations of citizens that this is a government task. It is not surprising therefore that the argument of this chapter poses a number of largely implicit underlying questions of policy, which can be summarised in the questions, 'can it be done?', 'how is it done?' and 'should it be done?'

There is the instrumental question, can heritage, as defined above, be deliberately used to create distinctive localities which encourage an identification of people with places? More specifically, can places be planned with the objective of revealing, preserving, enhancing or inventing local place identity and particularly can heritage be used as an instrument for achieving this objective? The justification for this endeavour is that there is a positive relationship between local place identities and quality-of-life. The idea is that distinctive place identities increase the well-being of those who experience them and, through that, contribute a recognisable and measurable improvement to the quality-of-life. Expressed so blandly, this is at least a highly questionable notion, yet it is quite implicit in many public policies for the shaping of place identities. The question 'should this be done?' is usually implicit.

A further logical progression from identity to well-being and then to health, both physical and mental, has been made by Eyles and Williams (2008). Although there may be a commonsense link between quality-of-life and health, being happy and being healthy would seem to be components of the same quality; it is beyond the scope of this argument to trace any possible cause and effect between them and relate this to places.

It may seem self-evident and hardly worth restating that individuals do seek out places that possess a sense of place as long as that sense is composed of elements of visual comprehensibility, aesthetic gratification and agreeable historical associations. Residents are prepared to pay a premium above the utility value of property in order to live in places that real estate brokers would describe as possessing 'character'. Tourists freely seek out and pay to visit such places. As implicit in the above, even some businesses will pay for the cachet value of addresses in such places. Thus people are behaving as if such a place-identity dividend actually exists.

There are, however, a number of practical difficulties in this reasoning. It is not difficult to draw a map of heritage density in the sense of the number of designated monuments, demarcated historic areas and more generally the amount of official attention of heritage agencies lavished

upon one place as opposed to another. In this sense, some places could be recognised as being heritage-rich and others heritage-poor: the notion that Heidelberg, York and Savannah have more heritage than Munchen-Gladbach, Preston and Cleveland would seem no more than self-evident on such a map of the supply of heritage resources and facilities. Further it could be assumed that the distribution of heritage, defined in these terms, would correspond to the strength of place identity in that heritage-rich places would possess a stronger positive identity than heritage-poor places, which would possess only negative or non-existent place identities. Thus a geography of high and low identity could then be extrapolated from such a map, so that the qualities of the former could be recognised and enhanced and those of the latter corrected, following the well-established logic of the Tourist-Historic City (Ashworth and Tunbridge 1990, 2000).

There is an implicit assumption in such a simplistic reasoning that heritage creates not only strong but also beneficial identities. This is not necessarily the case. A strong place identity with a high, even global, recognition is not in itself automatically beneficial. Auschwitz, Chernobyl and currently Guantanamo Bay have strong, instant and worldwide acknowledgment as distinctive places created by their heritage of past events, but it is unlikely that either residents or tourists, where possible, receive much benefit from this, at least in the sense of enhanced well-being. It also cannot be assumed that people only identify with what they or others consider to be desirable connotations: the identification can equally be with negative qualities. Leaving aside extremist identification with places of horror, the accolade of being the ugliest, poorest or roughest place may even be embraced and cosseted by inhabitants in a way that is defensive and even affectionate. These attributes of 'our dirty old town' also encourage identification, if only a pride in survival in adversity, and indeed may even be competed for by local governments as being a useful image for the leverage of government subsidies.

Finally the transition from heritage to identity could be extended to quality-of-life. A major difficulty in constructing such a causal chain is that there is little evidence that people who live in heritage-rich areas with a strong consequent place identity are psychologically more stable and content or socially less dysfunctional than those who do not. Even if the inhabitants of such heritage-poor places were discovered to be more prone to various psychological or social malaises than those of heritage-rich places, such a discrepancy could usually be more easily explained by other economic or social variables. Simply, if the perceived heritage endowment is indeed higher in Bath than in Bradford, then those with larger economic resources will tend to choose to live in the former rather than the latter place, and thus heritage-rich places will be inhabited by relatively more higher-income people which could explain any variance in functionality.

As with many areas of policy, including particularly those relating to the conservation of the natural and built environments, the question of who is making decisions becomes intertwined with the decisions themselves. In this case, 'who is the identifier?' may be as important to determine as 'what is being identified?' Much of the argument above is based upon heritage designations and decisions by outside expert agencies irrespective of the identification of locals who may view their localities in quite different perspectives and identify with a place-bound heritage based upon their personal heritage experiences that would be unrecognised by outsiders, along with the quality-of-life those experiences may locally generate.

There is also an equity argument that is rarely confronted. If some places possess more heritage-induced identity, which is conferring more benefits and raising the quality-of-life more than others, then it would be self-evidently more equitable to direct public resources to compensating those places and people so deprived rather than further rewarding those places and people who are already fortunate. Most public policies however tend to the opposite allocation, often in the name of the tourism economy. Places already recognised as distinctively 'historic' are likely to be further enhanced; those not so recognised are likely to continue to be neglected.

There is another quite different motivation for official policies for the recognition, protection, enhancement and promotion of distinctive place identities that is not just any supposed beneficial

impact upon the local quality-of-life but upon their effect on the creation of locality for wider reasons. Here it is not moreover just a question of strong, as opposed to weak or non-existent, place identity but the favouring of one sort of identity over another. These are the policies of national agencies, mentioned earlier, that attempt to use locality for dominantly national goals, rather than local agencies seeking local benefits more directly relatable to quality-of-life. Localism in such programmes is a national political philosophy explicitly applied as a counterpoise to globalism. A compensating balance is sought between the economic gains acquired from globalisation and the perceived cultural losses incurred. Globalisation may certainly instigate or accelerate change in senses of place leading to the substitution of one place identity for another at a different scale.

There are two main difficulties with such national attempts to enhance local place identities seen as under threat from cultural globalisation. First, there is certainly the possibility of the absurd situation where outside government officials define the sense of place of locals who are informed what their acceptably recognisably distinct official local identity is to be, which would seem to defeat the initial purpose of the exercise. Second, such an attempt of national governments to support a sense of local identity may itself lead to a standardisation of what is regarded as local resulting in reproduction of the same indicators of locality and thus a homogeneity which again denies the purpose of the exercise. Neither of these outcomes is helpful to the sense of place of either residents or visitors, or to the quality-of-life of either that might be derived therefrom.

Conclusion

Quality-of-life in tourism is conventionally associated with the host communities but is equally an issue for the tourists themselves; furthermore the life quality of their experience may be expected to interact with that of host communities in manifold ways, ultimately implicating both social goodwill and economic profit. Tourism is often identified, not least above, with freedom. In reality, however, tourists do not operate in a mythical liberated 'leisure society' but within a restricted time-space-cost 'box', further constrained by information shortfalls (the Internet notwithstanding), and now aggravated by the delays, costs and even incivilities of security controls and related 'red tape', most obviously at airports. As we have noted, tourism involves stress. The negative implications for tourists' quality-of-life and its interactive significance for that of host communities are surely an issue meriting further academic study, weighed in the balance with the positive attributes of tourism of which our present concern, as discussed above, is heritage.

The interactivity of tourists' and residents' quality-of-life is thus a topical issue; but it is not new. Thirty years ago, the heritage-oriented Winter Carnival in Quebec, Canada, was generating serious negative life quality issues between the two groups (Heritage Canada 1980). Clearly quality-of-life is not, and was not then, separable from the concept of sustainable tourism. This, of course, raises many questions: ultimately – for residents and tourists alike – is tourism sustainable at what quality-of-life?

We have referred to the overlap between tourists and residents that qualifies this familiar dichotomy: former residents may return as ostensible tourists, particularly with generational passages; former tourists may return as part-time or permanent residents. The 'second home' phenomenon thus engages our theme, and with it presently unanswered questions, such as: do visitors bearing the responsibilities of home ownership in 'heritage' districts empathise with residents or with other visitors, and do they bridge or widen the gulf that may emerge if friction develops between them? What are the quality-of-life implications for both sides and for the hybrid group themselves, particularly where they insert themselves into the market for a perceptually limited heritage resource?

Finally we return to a starting premise: tourism quality-of-life involves a third constituency, those who are collaterally involved either actively or passively in what has now arguably become overall the greatest of all human migrations. Their quality-of-life may be impacted in a myriad positive or negative ways, ultimately implicating the sustainability of the planet and thus the quality-of-life of humanity as a whole.

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Chapter 22

Ethnic Tourism and Resident Quality-of-Life

Li Yang and Xiang (Robert) Li

Introduction

Ethnic tourism is a unique form of tourism motivated by a visitor's search for exotic cultural experiences through interaction with distinctive ethnic groups (Yang et al. 2008). It provides tourists with the chance to experience a unique culture, landscape, and ways of life different from their own. In recent years, ethnic tourism has developed at a considerable speed world-wide. It has been promoted and widely adopted as a strategy for economic development and cultural preservation in many countries (Grunewald 2002; Oakes 1998; Wood 1997). Such tourism development has significant impacts on ethnic communities where the option for development is limited (Yang and Wall 2009). Although the positive economic and social impacts of tourism development have contributed to locals' improved QOL in some communities, to other communities, the displacement effect associated with tourism development has indeed led to the deterioration of residents' QOL (Ap and Crompton 1998; Wang and Wall 2007).

The concept of QOL has received increasing attention in tourism studies. Many scholars have explored the contribution that tourism in general makes toward various aspects of the QOL of both hosts (i.e., destination residents) and guests (i.e., tourists) (Neal et al. 1999, 2007; Perdue et al. 1999; Moscardo 2009). In contrast, only limited attention has been given to the impact of ethnic tourism on QOL, particularly the QOL of host populations. This chapter addresses this by exploring ethnic communities' perceptions concerning their QOL and ethnic tourism development. The purposes of the study are to review existing research lying at the intersection of the study of ethnic tourism and QOL, and to examine how ethnic tourism affects host groups' culture, ethnicity, and QOL from a community perspective. This chapter will start from a review of the literature concerning QOL and ethnic tourism first, and then present case studies to document the impact of tourism on ethnic communities' QOL. The final section discusses the implications of this line of research.

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Quality-of-Life and Tourism

Quality-of-life (QOL) has become an important topic of broad discussion in the social scientific literatures in recent years (Andereck et al. 2007). Defining QOL is difficult because it is embedded in both the objective estimation of individuals' life circumstances and those individuals' subjective perceptions of their own life circumstances (Rapley 2003). Although there are a variety of definitions and models of QOL, most researchers agree that QOL is a multidimensional and interactive construct incorporating many aspects of people's lives and their living environments (Schalock 1996). For instance, Felce and Perry (1993) defined QOL as a universal material/psychological phenomenon:

Quality of life is defined as an overall general well-being which comprises objective descriptors and subjective evaluations of physical, material, social and emotional well-being together with the extent of personal development and purposeful activity all weighted by a personal set of values (Felce and Perry 1993, p13).

QOL is not only related to normative expectations about the qualities of citizens' daily lives, but also seen as equivalent to subjective well-being or life satisfaction, a psychological quantum indicating the satisfaction of particular people with their individual lives (Andereck et al. 2007; Rapley 2003). QOL has various levels of life satisfaction which may vary over time and can change dramatically through new, intense life experiences (Liburd and Derksen 2009). Thus, QOL is a socially constructed concept that subsumes both objective and subjective factors. QOL studies are usually either objective or subjective in nature. Objective QOL studies focus on social indicators (e.g., income and crime rate) and address measurable environmental, social, and epidemiological trends across space and time, whereas subjective studies focus on life satisfaction, and can in turn measure perceptions of physical properties that objective studies generally target (Andereck and Jurowski 2006; Diener and Suh 1997; Phillips 2006).

Researchers from a range of disciplines have proposed many different conceptual frameworks to gauge QOL of both individuals and entire populations (Moscardo 2009). For instance, Mitchell (2000) devised a cyclical model based on six components: health (mental and physical), physical environment (nuisance, visual perception and scenic quality, climate, pollution), natural resources, goods and services (natural resources, goods, social infrastructure and services), community development (community structure, social networks and group relations, political participation), personal development (individual development through recreation and leisure, through learning), and security (personal economic security and standard of living, housing, administration of justice, crime, and safety). Sirgy (2002) offered a review of 13 different models (including two of his own) from a marketing perspective, which identify between 5 and 16 dimensions or domains of QOL. Alkire (2002) also reviewed different approaches that describe the main dimensions of QOL, and identified seven authors whose work has been most influential. In an extensive review of empirical QOL research, Cummins (1996) found strong support to the existence of five main domains – material well-being, emotional well-being, health, productivity, and friendship – and some evidence to support two further areas of safety and community. A major challenge for QOL research is the need to ensure that community- or national-level indicators are linked to individual experiences and perceptions of well-being (Costanza et al 2007).

In spite of the intuitive connection between tourism and the QOL, scientific investigation of the interrelations between the two notions is still in its infancy (Rätz et al. 2008). With the rapid growth of the travel and tourism industry, the critical role of tourism in QOL is increasingly recognized by many countries. Many researchers agree that the symbiosis of tourism and the quality-of-life can be interpreted with reference to both the tourists and the local community (Neal et al. 1999, 2007; Perdue et al. 1999; Richards 1999; Jurowski and Brown 2001; Moscardo 2009). A series of studies have addressed issues related to the ability of tourism to both enhance

and diminish the QOL of local residents in the host community (Cohen 1978; Jurowski et al. 1997; Perdue et al. 1999; Sirgy et al. 2000), to contribute to leisure satisfactions of travelers (Jeffres and Dobos 1993; Kousha and Mohseni 1997), and to enhance the QOL of travelers (Dann 2001; Neal et al. 1999, 2007). However, the forms of interpretation and the extent of psychological changes reflected in experiences are assessed by different methods and indices (Kim 2002; Neal 2000; Rátz et al. 2008). Indices encompassing diverse factors have been used to reflect the social, economic, and physical impacts of tourism on local communities, and the tourists' state of mind as reflected by the changes in their QOL (Kovács et al. 2007).

QOL research in travel and tourism has revealed that tourism can "contribute to the QOL through allowing people to pursue a range of interests and by providing the opportunity for social interaction, personal development, and individual identity formation" (Richards 1999, p. 189). Tourism has many direct and indirect positive benefits for travelers, such as greater levels of happiness, improved health, increased longevity, increased self-esteem, greater satisfaction with various aspects of life, and greater overall life satisfaction (Diener 1984; Kilbourne 2006; Sirgy 2001, 2002). Tourism is an important aspect of leisure life, which plays a critical role in overall life satisfaction (Neal et al. 1999, 2004). The tourism industry can facilitate the QOL amenities and help host communities to attain desirable living environments (Andereck et al. 2007). On the other hand, the QOL of local residents may be improved through tourism products, such as festivals, restaurants, natural and cultural attractions, and outdoor recreation opportunities. An improved QOL can be seen through a higher standard of living, increased tax revenues, increased employment opportunities, and economic diversity (Andereck et al. 2007). There are concerns, however, that tourism may have a negative impact on the QOL of residents, through environmental damages, increased crime rates, higher cost of living, friction between tourists and residents, and changes in residents' culture and way of life (Ap and Crompton 1993; Bastias-Perex and Var 1995; McCool and Martin 1994; Ross 1992; Tooman 1997).

Tourism may have different levels of impact on the QOL of residents during different stages of development. Kim (2002) reported that QOL of residents is higher during the maturity stage of tourism development than the initial stage. However, when tourism development enters its declining stage, QOL also starts to decline. Further, the volume of tourism may covary with QOL. Roehl (1993) documented that destinations with better QOL had more tourism activity than did nations with less well-developed QOL. Cecil and colleagues (2008) found a positive relationship between three QOL dimensions (being – who the individual is, belonging – people's relationship with environments, and becoming – individual activities to achieve personal emotional, mental and spiritual goals, hopes and aspirations) and locals' understanding of the concept of cultural tourism among Indianapolis residents. Liburd and Derksen (2009), in an exploratory study of the Danish Wadden Sea Festival, suggest that "the relationship between festivals as cultural experiences and the expected outcome of transformation and identity creation is far more complex than usually reflected in the instrumentalist view and cultural policies underlying these festivals" (p. 143). They call for the need for an emic approach and inclusion of subjective indicators to deconstruct multiple dimensions of QOL. In a comparison study of the perceived tourism-related QOL domains for Hispanics and Anglos residents, Andereck et al. (2007) suggested that cross-cultural resident attitude and QOL studies in tourism are essential in the appropriate representation of the diversity within communities.

Ethnic Tourism and Quality-of-Life

Following a dramatic increase in the travel and tourism industry, ethnic tourism has grown in popularity in recent years (Magnoni and Cable 2008). Many countries have taken advantage of their cultural diversity and employ ethnic tourism to stimulate local economic development

(Henderson 2003; Jamison 1999; Wood 1998). There is considerable literature from various disciplines, such as anthropology, sociology, cultural studies, geography, and planning, which contribute to deciphering the nature of ethnic tourism, the relationship between tourism and ethnicity, the interaction between tourists and ethnic communities, and the consequences of ethnic tourism (Bruner 2005; Cohen 1989; Fagence 2000; Grunewald 2002; Li 2004; Oakes 1992, 1997, 1998; Smith 1977, 1989; Swain 1989, 1990; Wood 1997; Xie 2003; Yang and Wall 2008, 2009).

The first use of the term “ethnic tourism” is attributed to Smith (1977) who defined ethnic tourism as tourism “marketed to the public in terms of the ‘quaint’ customs of indigenous and often exotic peoples” (p. 2). Harron and Weiler (1992) defined ethnic tourism as travel “motivated primarily by the search for first hand, authentic and sometimes intimate contact with people whose ethnic and/or cultural background is different from the tourist’s” (p. 84). Ethnic tourism activities typically include visiting ethnic villages, native homes, and ethnic theme parks; being involved in ethnic events and festivals; watching traditional dances or ceremonies; or merely shopping for ethnic handicrafts and souvenirs (Yang and Wall 2008). The terms “aboriginal tourism” (Getz and Jamieson 1997; Mercer 1995) and “indigenous tourism” (Butler and Hinch 1996; Ryan and Aicken 2005) are sometimes employed interchangeably with “ethnic tourism” to refer to essentially the same phenomenon. However, aboriginal tourism or indigenous tourism explicitly involves indigenous people, whereas in ethnic tourism, the people on whom the tourism activities are based are not necessarily indigenous.

A number of anthropologists and sociologists have examined the relationship between tourism and ethnicity and the consequences of ethnic tourism critically (Hitchcock 1999; Jamison 1999; MacCannell 1984; Picard and Wood 1997; Smith 1977, 1989; van den Berghe 1980, 1992, 1994; van den Berghe and Keyes 1984; Wood 1984, 1997, 1998). Most generally agree that ethnicity has become commodified into a product re-created and marketed to tourists (Smith 2001). In this product, tourism and ethnicity share a close relationship in which ethnic identities are represented or constructed through tourism images (Henderson 2003). Van den Berghe emphasized (1980, 1992, 1994) that tourism does not just affect ethnicity but often constitutes a form of ethnic relations, particularly in developing countries. Commonly, there are three economically unequal groups involved in these relations: the tourist, the “touree,” and the middleman. The “touree” is the native-turned-actor, in other words, a native who modifies his or her behavior to meet tourist demands. The middleman is the broker who manipulates ethnicity for gain and mediates the interaction of tourist and “touree” (Van den Berghe and Keyes 1984). Often, the economic benefits of tourism accrue disproportionately to the dominant group functioning as middlemen (Wood 1997).

The emergence of ethnic tourism has been considered to be a mixed blessing for host populations due to its positive and negative consequences (Li 2000). There is a substantial body of literature on the perceived impacts of ethnic tourism on the host community using different methods including both qualitative and quantitative approaches (Cohen 1988; Esman 1984; Martinez 2003; Oakes 1992, 1997, 1998; Smith 1977, 1989; Swain 1989; Wood 1997; Xie 2003). Case studies are commonly used to describe, explain, and predict tourism impacts and community attitudes within and across cultures. Although the concept of QOL is implied in much of the literature, few studies have specifically considered the impact of ethnic tourism on QOL. Rather, they have focused on resident attitudes toward tourism, and more specifically, perceptions of tourism impacts. Some studies are largely concerned with the negative consequences, such as cultural and environmental destruction (Cohen 1987; Greenwood 1989; Oakes 1998; Selwyn 1996; Wood 1997) or economic exploitation (Britton 1982; Mowforth and Munt 1998). Conversely, others welcome ethnic tourism for its culturally constructive contributions (Adams 1997; Boissevain 1996; Grunewald 2002; Wall and Xie 2005), its conservation of natural and cultural resources (Henderson 2003; Jim 2000; Pigram 1980), and its positive economic impacts (Chow 2005; Pitchford 1995; Swain 1989, 1990).

In early studies, ethnic tourism was often portrayed as a destructive force leading to the decline of traditional cultures, diminishing resident QOL, and causing problems for host communities such as increased social tension, sociocultural breakdown, and an erosion of the sense of identity and place (Cohen 1988; Esman 1984; Greenwood 1989; Klieger 1990; Smith 1977, 1989; van den Berghe 1992; Wood 1997). Esman (1984) indicated that tourism increases contact between different cultural groups, which can produce stress, especially where the tourists are perceived by locals as being rich and leisured while they are poor and are obligated to take servile roles. Harron and Weiler (1992) stated that there is reinforcement of inequities as a result of cross-cultural contact between the tourists and hosts, but that the effect is not usually very significant. Van den Berghe (1992) likened ethnic tourism to visiting a “human zoo,” in which “many locals feel that their privacy is invaded, they are frequently stared at and photographed against their will, they are shocked by the demeanor or dress of their unwanted guests, and their children are ‘spoiled’ or develop demeaning begging behavior” (p. 235). From this vantage point, ethnic tourism is seen as “development which has the power to dilute unique and authentic traditions with standardized stereotypes tailored to the exotic yearnings of the Western traveler” (Oakes 1992, p. 3).

A number of other authors have stressed the commodification and degradation of ethnic culture and the denigration of sacred sites (Crystal 1989; Hitchcock and Brandenburgh 1990; Klieger 1990; Ryan and Aicken 2005; Swain 1989; Urbanowicz 1989). The criticism of “culture by the pound” is often adopted in the earlier studies of cultural impacts of tourism on ethnic communities. Ethnic tourism tends to be interpreted as leading to negative impacts by commodifying cultural manifestations and destroying their cultural meanings (Cohen 1988). Here, commodification refers to a pattern of commercialization in tourism, which is often criticized as resulting in the “bastardization” and “pollution” of previously authentic ethnic cultures for the purpose of touristic display (Wood 1997). Such studies suggest that host groups develop “phony-folk-cultures” to meet tourists’ desires to experience cultural otherness, which leads to the loss of original meanings and the cultural significance of traditions. These scholars express their anxiety about the survival of ethnic cultures.

The cultural impacts of ethnic tourism have been closely linked to issues of authenticity, a concept in tourism studies shaped by the work of MacCannell (1973, 1976) who suggested that a host community, motivated by economic benefits, misleads tourists into accepting modified attractions as “authentic,” creating a “false touristic consciousness.” As van den Berghe and Keyes (1984) stated, the very presence of tourists transforms the native into a “touree” who fakes his culture to satisfy ethnic tourists’ thirst for authenticity; meanwhile, “the tourist invasion assaults his culture and subjects it to the homogenizing process known as modernization” (p. 346). As modern tourists eagerly seek backstage (genuine or non-contrived) experiences, to satisfy these demands for authenticity, hosts often create staged authentic presentations of their own culture to make it more appealing or accessible (MacCannell 1976). Although some tourists may not be satisfied, these staged representations may protect the community from unwanted social impacts by satisfying the majority of tourists and lessening their need to penetrate the culture more deeply (Yang and Wall 2009). Staged events may prevent tourism from destroying a culture or making undesired social impacts by having masses of tourists in traditional villages (Wall and Xie 2005).

More recently, much research reveals the positive effects of ethnic tourism, economically, culturally, and politically (Chow 2005; Harron and Weiler 1992; Henderson 2003; Hillman 2003; Pitchford 1995; Swain 1989, 1990; Walsh and Swain; 2004; Xie 2003). The common benefits are often economic, including higher income, more employment opportunities, and a higher standard of living (Altman 1988; Crouch and Ritchie 1999; Johnston 1990; Theerapappisit 2009). Ethnic tourism can stimulate national and local economic growth and enhance the QOL of those involved (Hiwasaki 2000). By marketing itself to tourists, a marginalized group can improve

its QOL economically through the creation of employment and entrepreneurial opportunities (van den Berghe 1992). Ethnic tourism has been promoted as a development strategy for poverty reduction and creating livelihoods in poor ethnic regions (Oakes 1998; Yang and Wall 2009). The ethnic poor are often culturally rich, which is a tourism asset (Theerapappisit 2009). Ethnic tourism development has been a response of the local entrepreneurial middle- and upper-classes to new economic opportunities in many remote parts of developing countries such as Cuzco, Peru (van den Berghe 1980, 1994), Chiang Mai, Thailand (Cohen 1989), and Guizhou, China (Oakes 1998).

Many authors note that the promotion of ethnic tourism has positive social and cultural impacts on resident QOL, such as cultural exchange, revitalization of local traditions, improved QOL, and an enhanced and more positive image for the community (Grunewald 2002; Henderson 2003; Liu 2003; van den Berghe 1992). It provides the groups showcased as the object of ethnic tourism with a medium through which to promote itself, its history, and its culture (MacCannell 1973). Ethnic tourism can enlighten tourists as well as natives themselves about the native culture (Hiwasaki 2000). It can serve as a means of highlighting and assisting in the conservation and preservation of threatened minority heritage (Esman 1984; Henderson 2003). It can also be a positive force for cultural revitalization (Grunewald 2002; Harron and Weiler 1992; Zeitler 2009), including the revival of religious ceremonies, art forms, and craft production (Crystal 1989; Hitchcock and Brandenburgh 1990; Smith 1989), fostering creativity and providing a platform for communities to present themselves in a more positive light (Cohen 1988; Graburn 1984; Pitchford 1995). New “tourist arts” are not necessarily degraded, but can lead to the creation of new art forms (Graburn 1989). In short, “cultural traditions are often reinterpreted and even revived rather than destroyed” (van den Berghe 1992, p. 235–236). Indeed, ethnic tourism has provided some groups with an otherwise unavailable means of educating the outside world about their plight (Hillman 2003; Klieger 1990; Schwartz 1991).

Ethnic tourism can assist in enhancing awareness of ethnic groups that are being undermined by internal and external forces, protecting the cultural heritage of marginalized minorities, and promoting the restoration, preservation, and re-creation of ethnic attributes that were seen as dying out or passé (Henderson 2003; MacCannell 1984). It can bring international attention to the political claims of oppressed minorities (Hiwasaki 2000). Self-awareness may be promoted among local people, reinforcing and strengthening local identity through pride in local culture (Boissevain 1996; Esman 1984; Henderson 2003; Johnston 1990; Klieger 1990; Swain 1990). This is a phenomenon observed in many places: in Bermuda (Manning 1979), among Cajuns (Esman 1984); in Bali (McKean 1989), among Native American Indians (Simpson 1993); in Malta (Boissevain 1996), among Malaysians (King 1993); in Yunnan and Guizhou, China (Hillman 2003; Oakes 1998; Swain 1989; Walsh and Swain 2004); in Singapore (Henderson 2003); and elsewhere. Tourism, then, can provide an important opportunity for ethnic image construction and projection (Roosens 1989). As summarized by King (1993), the task of ethnic tourism development in Malaysia, similar to many Southeast Asian countries, has partly been to “engender a local awareness of cultural matters and national identity and heritage, and to enhance national pride and commitments” (p. 109). In Hillman’s (2003) study, Shangri-la’s new tourism development has become a force for strengthening Tibetan identity, has increased ethnic awareness, and has stimulated the rejuvenation of culture for Tibetans whose traditions were previously ridiculed and suppressed.

The foregoing review synthesizes extant multidisciplinary research on QOL and tourism, particularly the impact of ethnic tourism on the QOL of the host community. Next, the authors will turn to two case studies recently conducted in ethnic tourism sites in Mainland China and Taiwan respectively.

Case Study 1. Minorities and Tourism: Community Perspectives from Yunnan, China

In an empirical study of the impacts of ethnic tourism on host communities, Yang and Wall (2009) used a theoretical framework to examine ethnic minorities' perceptions of tourism impacts on their QOL and their attitudes toward further development. The framework consists of four dimensions, including state regulation versus ethnic autonomy, cultural exoticism versus modernity, economic development versus cultural preservation, and authenticity versus cultural commodification. The case studies were conducted in two ethnic tourist villages, Dai Yuan and Mengjinglai, in Xishuangbanna Dai Autonomous Prefecture, Yunnan, China. Xishuangbanna is one of the earliest developed and most well-known ethnic tourism destinations in China. Dai Yuan is a popular ethnic attraction, which is built on five Dai villages, incorporating 326 households and 1,536 people in total. Mengjinglai is a remote and less-developed Dai village, consisting of 99 households and 460 people. These communities are rich in cultural heritage and provide a readily accessible exhibition of traditions, customs, folk culture, and the way of life of Dai people.

A mixed-method approach using multiple methods (surveys, interviews, informal discussions, and observations) were adopted in the study. Structured questionnaire surveys were distributed to all households in the villages studied. A total of 197 valid surveys were collected and used for analysis, including 63 questionnaires from Mengjinglai (a response rate of 64%) and 134 questionnaires from Dai Yuan (a response rate of 41%). In-depth interviews were conducted with 40 informants including community heads, the elderly, and young villagers to discuss specific topics in greater depth in order to better understand their perspectives on village tourism business and its impacts on community and individual QOL.

According to the survey results, residents from the two study sites share the same culture and customs and also have similar attitudes toward folk villages and ethnic tourism (there were no statistically significant differences between the attitudes of the communities). The research findings revealed that Dai people generally support ethnic tourism development in their region, and, particularly, they embrace tourism-induced economic development. The living standards of the villagers have been improved substantially as the income of households engaged in tourism has increased. Overall, community satisfaction was high with 73% of respondents believing that the benefits of tourism outweigh its negative consequences. There was wide awareness that tourism positively influences some aspects of QOL of the community and negatively influences others. Specifically, the majority of respondents believed that tourism played a major economic role locally (64%), promoted local economic development (76%), improved employment (72%), living standards (71%), road infrastructure (75%), quality of public services (62.4%), and community recreation (64%). However, the prices of local goods were also perceived to increase as a result of tourism by almost half (46%) of respondents, which negatively impacts the QOL of residents.

Although residents generally perceived tourism as a positive driver of their QOL, community heads and elders were concerned about dramatic cultural changes in their communities and the decline in religious beliefs and minority languages. Since the villages were turned into cultural parks for tourism purposes in the 1990s, the Dai have been facing the challenges of coping with a market economy and modernization. Their traditional way of life is changing due to economic development and the entry of outside commercial influences. The villagers have engaged in tourism through working for the park as employees; selling fruits, crafts, or souvenirs; or offering Dai food and accommodation. Some households have abandoned agriculture and have leased their rice fields to Han business people in order to earn more cash from tourism. Provision of bed-and-breakfast is very popular during the long holidays and the Dai New Year when hotels in the town cannot accommodate the masses of Chinese domestic tourists. Older men have changed

their work habits to stay competitive; Dai women who were never part of the public domain are becoming more noticeable; young children approach tourists for photographs and money. The average living standard of the tourist villages is higher than that of neighboring villages in terms of disposable income and quality of housing and roads.

Exposed to the opportunities offered by greater wealth and modernity, particularly through interactions with tourists and the arrival of television, Dai people have put higher priority on making money and pursuing modern lifestyles and a higher QOL. Many people wish more tourists would stay at their home for a fee, and those not involved in tourism also express a desire for tourism jobs. With the increase of disposable income, demand for the accoutrements of modern life is growing. Many families have built new style houses and purchased modern furniture, TV sets, VCD players, and motorcycles. Traditional bamboo stilt houses are vanishing, while “alien” architecture (Han-style brick houses) has rapidly appeared in Dai villages. These houses are symbols of wealth and modernity but ruin the reputation of exoticism for visitors. The contradiction between the tourists’ quest for exotic culture and the minorities’ desire for a modern life has intensified. Tourists, especially international tourists, want to see traditional versions of ethnic culture and experience unadulterated everyday village life, but with dramatic changes to the architecture and lifestyles of minority people, folk villages are losing their image of exoticism.

Although tourists are disappointed with the modern settings inside minority houses, minority people have not realized this side effect of their economic success. This dilemma is widespread in many developing ethnic destinations where improving economic conditions and QOL is still the local people’s major concern (Ying and Zhou 2007). These changes are not all attributable to tourism but are the result of modernization stimulated by the greater opening up of the villages to outside forces. However, tourism is undoubtedly an important factor where sharing and preserving local culture seem to be conflicting goals (Besculides et al. 2002). Protecting the distinctive cultural atmosphere and improving QOL for local residents were two major concerns in the community. There has been limited research directing tourism planners and managers on how to find an appropriate balance between development and preservation, but ways must be found to improve local livelihoods without losing cultural integrity and traditions in tourism development. One cannot stop the modernization that accompanies development, but one can support for the preservation of cultural elements in a way that benefits local people.

Case Study 2. Tourism as a Sustainable Livelihood Strategy

Drawing upon Scoones’s (1998) sustainable livelihood framework, Tao and Wall (2009) used a sustainable livelihood approach to examine the contribution of tourism to livelihoods of an indigenous community. A case study was conducted in a Cou indigenous community in Shanmei, Taiwan, to explore how tourism is integrated into local livelihood strategies. The community is located in a remote area in the mountainous interior of Taiwan. Data were collected through qualitative methods including direct and participant observation, in-depth interviews with key village informants, village residents, government officials, academics, and NGO staff. A total of 131 interviews were completed.

Tourism is a relatively recent activity in the long history of indigenous communities in Taiwan. There are limited cash-earning opportunities in the mountains. The Danayigu Ecological Park was established in Shanmei in 1995 based on a combination of natural and cultural attractions. The main tourist activities are walking the trails along the river, viewing the fish, and exposure to Cou culture, particularly local foods and cultural performances. The park has attracted a substantial number of visitors and has greatly contributed to villagers’ livelihoods and QOL by creating opportunities for employment and cash earnings. The park has enabled some residents

to operate their own businesses in the community, which are especially beneficial for mothers and single parents with young children, the disabled, unemployed, the elderly, and women. Opportunities to participate in tourism are distributed unevenly in Shanmei. The main areas of concentration are in and around the park plus, to a lesser extent, along a major access road. Within the community, those with strong financial capital and business skills have more opportunities. Even though not every villager in Shanmei is involved in tourism business, the majority has connections to the park, and an increasing number of local livelihood activities are directly or indirectly related to tourism, which enhances their well-being and QOL.

Tourism has been important in increasing the range of livelihood options in the community. Many self-run enterprises have emerged such as lodges, restaurants, homestays, campsites, and cafes. For enterprises like lodges and homestays, revenue comes from charges for accommodation, food and beverages, packaged tours, services, and sales of local specialties including agricultural products and some local-made handicrafts. If customers are interested in making handicrafts themselves, business owners will refer them to villagers with such skills. The cafes serve coffee, tea, and meals to visitors and provide a variety of merchandise, such as handicrafts made by villagers. Almost no funds were needed for investment in the only campground in Shanmei. Most facilities in the campground are made of local materials. Income is immediate, and work is close to home and can be shared among household members. Income comes from multiple sources, including camping and parking fees, barbecue and tent rentals, and sales of items such as firewood and Cou-style pestle rice. Households that run lodges or homestays and provide package tours or Cou life experience camps usually pay family members, relatives, or other villagers for help, such as for rent of trucks to take tourists sightseeing, cooking, barbecue operation, cleaning rooms, and guiding tours.

Tourism has the potential both to complement and to compete with other economic activities. Tourism should not be considered as a panacea for developments in indigenous or ethnic communities. It is not a reliable source of income in many marginal economies, but it may supplement incomes derived in other ways and help to improve resident QOL. The adoption of a sustainable livelihood approach offers a new way to understand tourism in the broader economic and cultural context in which it takes place. The strength of the sustainable livelihood approach is that it encourages the adoption of a broad perspective from which to examine the impacts of tourism (Tao and Wall 2009).

Implications and Conclusion

This chapter reviewed extant literature on ethnic tourism and QOL, in particular, on the impacts of ethnic tourism on the host communities' culture, ethnicity, and QOL. The review shows that tourism and ethnicity are highly interrelated, and the development of ethnic tourism has been found to have both positive and negative impacts to the host communities. While some studies associated ethnic tourism with diminishing resident QOL and increasing sociocultural problems, other studies have revealed the economic, cultural, and political contributions of ethnic tourism to the QOL of host communities. Ethnic tourism has been found to help alleviate poverty, enhance community pride, and promote cultural exchanges and revitalization.

Most of the aforementioned studies focused on tourism impacts in general with the notion of QOL implied, leading to the present authors' conclusion that, while much is known about ethnic tourism, little effort has been made to link the insights to QOL. Few studies to date have specifically considered the impact of ethnic tourism on QOL. Little research has been attempted to understand the extent to which ethnic tourism impacts on the QOL of both hosts and guests. The broad conceptualization of QOL presents difficulty to develop methods of measurement that

provide a full understanding of QOL, and, more specifically, the impacts that ethnic tourism may have on the QOL of both host populations and visitors. Current approaches to ethnic tourism are largely based on a combination of economic, sociological, and psychological measures. The primary sources of these methods are largely from sociology and anthropology, although other disciplines have increasingly contributed to the field. The case study approach is commonly adopted in researching ethnic tourism. A systematic analysis of the intricate relationships between ethnic tourism and QOL is missing.

Although QOL measurements per se are not new, it is a relatively recent endeavor to research the impacts attributed from ethnic tourism on the QOL of host populations. A comprehensive perspective is necessary in order to improve our understanding of the characteristics of ethnic tourism and its dynamic relationship and interaction with QOL (both negative and positive). There is a need to develop more comprehensive framework that integrates both objective and subjective measurements to examine the ability of ethnic tourism to contribute to QOL as well as the degree to which it can be generalized across situations or destinations. It is necessary to link community- or national-level indicators to individual experiences and perceptions of subjective well-being (Costanza et al 2007). An interdisciplinary approach is required to research ethnic tourism and QOL where synergies between different disciplines are developed to produce a more holistic body of theory and methods.

As indicated above, early studies on ethnic tourism tended to focus on the negative impacts of tourism development on local communities, whereas recent research has revealed more of the positive effects of ethnic tourism. In terms of QOL, such positive effects were mainly reflected by economic benefits. From a research method perspective, the link between ethnic tourism development and the economic aspect of QOL (depicted through either objective indicators or subjective evaluation of communities' or individuals' material well-being) seems to be feasibly detectable. In comparison, studying other aspects of QOL (e.g., emotional and sociocultural) could be more of a challenge due to the general lack of baseline data and objective measures that have been universally agreed upon. This calls for more longitudinal research combining assessments on both objective and subject indicators in the future.

The two empirical case studies reported in this chapter showed that although the local communities generally welcome tourism development and recognize its positive contribution to their QOL, concerns remain on the dramatic sociocultural changes and modernization in their communities due to substantial commercial influences from the outside. To what extent such changes would affect the local culture and residents' QOL in the long run remains to be seen.

While ethnic tourism promotes economic development and the pursuit of QOL improvement among minority people, it also produces a development dilemma. Tourists want to see traditional versions of minority culture and to experience unadulterated everyday village life, but the dramatic changes to the cultures and lifestyles of minority people reduce tourist interests. Such dilemma makes a plea for better policy guidance and tourism planning.

Ethnic tourism is often used by governments as the savior of struggling economies. In many Asian countries, the government and tourism entrepreneurs are often the main powers in developing ethnic tourism, but most of these groups are not members of minorities (Yang and Wall 2009). Their administrative and commercial involvement in tourism strongly shapes the ways of representing culture in tourist sites and further influences tourism practices of minorities. Minority people are usually marginalized economically and politically because they have limited control over tourism resources. Government policies, plans, and agendas are typically focused on expansion, and their definition of success is generally based on numbers of visitors and profits (Yang et al. 2008). Meanwhile, tourism businesses are apt to concentrate on short-term commercial profit with little concern about the consequent long-term social and environmental costs for local people (Yang and Wall 2009). Ultimately, more stable and effective tourism policies and regulations are required to protect ethnic resources and mitigate negative impacts of tourism.

Increased cooperation between the government, minorities, and tourism companies is needed to improve the benefits to and experiences of tourists, minorities, and the tourism industry. Celebration of cultural differences, especially if accompanied by careful representation and sound planning, may lead to enhanced QOL and pride of the host community.

One case study reported that within a community, members may not have equal opportunities to participate in tourism. Considering the economic benefits of tourism development, such uneven distribution of opportunities could result in uneven distribution of wealth, and ultimately power. This could have profound political implications to the community, when existing rules of resource allocation are threatened by external market and forces. This also means that future research needs to give more consideration of the QOL issue at individual and household levels.

Finally, this chapter mainly addresses the connection of ethnic tourism and QOL from a community perspective. How travel experiences to ethnic tourism sites affect the tourists' QOL remains a fascinating research topic. For instance, because tourism often helps form ethnic relations and construct ethnic identities (Henderson 2003; Ven den Berghe 1980, 1992, 1994), one might expect that tourists' interaction with the hosts could affect their perceptions of not only the hosts' but also their own ethnic identity. Future research on ethnic tourists' QOL could shed lights on ethnic tourism studies.

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Chapter 23

Alternative Tourism as a Contestable Quality-of-Life Facilitator

David Weaver

Introduction

This chapter considers the contestable relationship between quality-of-life (QOL) outcomes and alternative tourism. Following an outline of the latter's emergence, a clearer sense of its articulation as an ideal type is provided along with resultant QOL implications and imperatives. Empirical evidence from the literature on farm-based tourism, volunteer tourism, and community-based ecotourism is then presented to indicate the extent to which expected QOL outcomes are being achieved. Finally, the discussion section assesses two "alternatives to alternative tourism" that have the potential to achieve greater QOL benefits than its parent ideal type.

Emergence of Alternative Tourism

Most, if not all, engagement with tourism-related phenomena has an explicit or at least implicit concern with quality-of-life outcomes, both for destination residents and the tourists themselves. Thus, the widespread support for mass tourism development that followed World War II was based largely on the sector's alleged potential to broadly improve the standard of living for people in nations and regions devastated by conflict and/or newly emancipated from the constraints of de jure colonialism. Underpinned by the assumed desirability of modernization dynamics and the enabling efficacy of free market capitalism, mass tourism would elevate QOL through the direct and indirect generation of revenue and employment, especially in impoverished peripheral regions endowed with little but the sea, sand, and sun sought by a new breed of hedonistic middle class tourist to enhance their own sense of well-being. New infrastructure constructed to facilitate the transportation and accommodation of these tourists would also benefit local residents, as would efforts to increase a destination's tourism appeal and sense of place by preserving local cultural, historical, and environmental resources. If, initially, these benefits were disproportionately realized by the wealthy, then this could be rationalized as an incipient stage of development soon to be superseded by broader "trickling down" effects.

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Jafari (1989, 2001) describes how increasing disillusionment with the capacity of mass tourism to achieve broadly based positive QOL outcomes, as per an “advocacy platform,” gave rise in the 1970s, at least among community activists and academics inspired by dependency theory, to a concerted “cautionary” perspective on tourism development. Direct revenue inputs were seen to be mostly diluted by profit/wage repatriation and the import of products and services consumed by the mass tourist, which also inhibited local economic stimulation through the multiplier effect. Employment was mostly seasonal and low wage, while the forces of commodification and laissez-faire development could just as easily undermine as protect local cultural and environmental amenities. Ironically, the poorest destinations were considered to be the most vulnerable to these negative effects because of their incapacity to provide sufficient indigenous inputs of investment, goods, and services to sustain a mass tourism industry.

In Jafari’s schemata, the cautionary perspective was augmented in the early 1980s by an ideologically affiliated “adaptancy” platform distinguished by its support for tourism models allegedly capable of achieving the broad-based QOL improvements not attainable through conventional mass tourism. An implicit core assumption of this perspective is that unlike large cities, local-scale destinations lack the appropriate socioeconomic capacities and resiliencies to fully realize the benefits that can be theoretically achieved from sustained mass tourism. Better *adapted* to such places, supporters argue, are modes of tourism alternative to mass tourism specifically. An early reference is Britton (1980), who advocated for an “alternative” form of tourism in the Caribbean that would empower local residents, and hence improve their QOL, through local control, small-scale operations, localized economic integration, and “reduced social and aesthetic intrusion.” All would need to be abetted by appropriate regulation to avoid predation from the unrestrained free market.

Dernoi (1981) subsequently was the first to position alternative tourism (henceforth AT) as a specific product, defining it in confined terms as activity where tourists receive accommodation in the homes of local residents. As such, it could tangibly improve QOL of hosts by generating un-leaked supplementary income, developing entrepreneurial and interpersonal skills, upgrading dwellings, and reducing congestion. Concurrently, QOL of guests would be enhanced by exposure to authentic local experiences and people.

Articulation of AT and QOL Implications

Since its initial conceptualization as home-based or homestay tourism (Dernoi 1981; Hobson and Mak 1995; Ranck 1987), the parameters of AT have expanded considerably to encompass a diverse array of activities and products. These now include backpacking (Scheyvens 2002; Westerhausen and Macbeth 2003), cultural villages (Bilsen 1987), religious retreats (Sharpley and Sundaram 2005), farm-based tourism (Frater 1983; Weaver and Fennell 1997a), feminist travel, political awareness tours (Higgins-Desbiolles 2003), volunteer tourism (Wearing 2001), and urban ghetto tours (Conforti 1996). Also notable is ecotourism’s emergence in the early 1980s as a nature-based form of AT and its particular concurrent affiliation with community-centered structures. In all cases, growth is assumed to be occurring due to concurrent growth in the number of consumers who are foregoing the traditional hedonistic or recuperative motivations of travel in favor of “meaningful” and “authentic” experiences that do not negatively impact host communities or environments (Poon 1993).

Weaver (2006) emphasizes the diversity of contemporary AT phenomena by showing how they variably affiliate with attraction (e.g., urban heritage tourism), accommodation (e.g., guesthouses and homestays), and motivation (e.g., feminist and volunteer tourism) orientations. Nevertheless, all manifestations tend to aspire if not strictly adhere to a basic set

Table 23.1 Selected ideal-type AT characteristics and associated QOL implications

AT characteristic	QOL implications
<i>Markets</i>	
Allocentric tourists	<ul style="list-style-type: none"> • Positive host/guest interactions; proclivity to purchase goods directly from local residents & be interested in local culture
Low volume	<ul style="list-style-type: none"> • Reduced congestion & stress on infrastructure/services
Extended length of stay	<ul style="list-style-type: none"> • Substantial total expenditures accruing to local residents
No distinct seasonality	<ul style="list-style-type: none"> • Steady accrual of benefits; no drought/deluge effect
No dominant markets	<ul style="list-style-type: none"> • Exposure to diverse range of tourists and less susceptible to economic downturns if dominant market weakens
<i>Attractions</i>	
Convey authenticity	<ul style="list-style-type: none"> • Tourist demand encourages preservation of authentic culture and natural resources
Accessible to locals	<ul style="list-style-type: none"> • Venue for social interactions with tourists; enhanced recreational & educational opportunities for locals
Semi-commercialized	<ul style="list-style-type: none"> • Compromise between financial benefits and maintenance of authenticity
<i>Accommodation</i>	
Smallness of scale	<ul style="list-style-type: none"> • Higher quality employment – locals can be owners & managers; more operational & owner flexibility
Dispersed	<ul style="list-style-type: none"> • No congestion associated with tourist districts; locals in peripheral regions can realize benefits
Unobtrusive/vernacular	<ul style="list-style-type: none"> • Local unique sense of place maintained & enhanced
Local ownership	<ul style="list-style-type: none"> • Empowerment & realization of financial benefits for locals
<i>Economic status</i>	
Strong local sector linkages	<ul style="list-style-type: none"> • Financial benefits realized by local suppliers, e.g., farmers
High multiplier effect	<ul style="list-style-type: none"> • Strong local economic growth despite low absolute revenues
Tourism as supplementary	<ul style="list-style-type: none"> • Diverse economy protects against drought/deluge cycles
<i>Regulation</i>	
High amount of regulation	<ul style="list-style-type: none"> • Ensure maintenance of conditions that provide sustainable benefits to local residents

Source: First column adapted from Weaver 2006

of characteristics that set them apart dialectically from mass tourism and reflect the tendency to perceive both the latter and AT as dichotomous ideal types, in keeping with the intensely ideological nature of the discourses that support each mode of development (Table 23.1). Thus, where mass tourism is inherently large scale, AT strives to maintain a small scale of resolution, the associated QOL implication being the feasibility of local ownership, and operational flexibility. Allocentric tourists, unlike the psychocentrics dominant in mature resorts, foster positive host-guest interactions and tend to purchase local goods and services as part of their quest for an “authentic” local experience.

AT-Related Imperatives

In addition to the proliferation of affiliated products and the designation of standard QOL benefits for local people, it is possible to discern in the evolution of AT a number of broader “imperatives” with more generalized QOL implications that pertain in varying degrees to different types of AT. These are designated here as imperatives because of AT claims, as an ideal, of ethical superiority over more conventional forms of tourism. In concert with the so-called “triple bottom line” outcomes that have achieved the status of orthodoxy within

sustainability discourses, we may identify (1) an economic imperative inherent in all modes that is focused on achieving strong local economic linkages through the concerted retention of revenue, investment, and employment within the destination; (2) an environmental imperative, embodied especially in ecotourism (see below), that compels the preservation of a destination's biodiversity and ecological systems; and (3) a sociocultural imperative that emphasizes the protection of traditional culture and the integrity of local social structures. The cultural aspect is emphasized in cultural villages, while the social aspect is dominant in the so-called community-based model of tourism which designates collectivities of local residents as primary agents and beneficiaries of tourism-related activity. Associated particularly with Murphy (1983, 1985), this model has spawned its own literature and body of advocates (including many contemporary NGOs) devoted to the principle of community empowerment, usually explicitly or implicitly in tandem with other AT principles and characteristics.

Complementing these core perspectives is (4) a political imperative that identifies AT as an activity that should support the *de facto* economic and geopolitical autonomy of resource-scarce microstates. A tangible expression occurred in the early 1970s (though not under the name "alternative tourism") when a leftist government in St. Vincent vocally rejected mass tourism in favor of small-scale tourism targeting regional Caribbean markets (Britton 1977). Although not couched in the strongly ideological rhetoric of the dependency theorists who inspired the early supporters of the cautionary and adaptancy platforms, more recent administrations in St. Vincent have continued to favor an AT-type development strategy for achieving desired QOL outcomes (Duval 1998), though it is possible that this is more a matter of pragmatism than conviction. A similar strategy was pursued in post-independence Dominica, but not until the non-feasibility of conventional resort tourism became apparent (Weaver 1991). AT strategies have also been proposed at a larger scale for Belize (Boxill 2003). Closely related to the political imperative is (5) a geopolitical imperative focused on the role that tourism, and AT in particular, should play in fostering world peace (defined broadly as the absence of social and environmental violence rather than only the absence of war) through face-to-face contacts and the "track II diplomacy" of low-level sporting and organizational contacts (D'Amour 1988; Weaver 2010a).

Finally, (6) a strong moral imperative is evident particularly in the efforts by church-related groups to foster socially responsible and responsive forms of AT in peripheral regions. Notable was a 1984 workshop on AT held in Chiang Mai, Thailand, by the Third World Tourism Ecumenical European Network (TEN) to inform the future development of Asian destinations (Gonsalves 1987; Holden 1984). This imperative is also explicit in the rapidly expanding field of volunteer tourism, which relies on the willingness of participants to engage without remuneration in activities intended to enhance the environmental, social or cultural well-being of target destinations (see below). In both situations, there is imparted a sense of obligation for all participants, including tourists and sponsoring organizations, to ensure that the well-being of local people is a top priority of all tourism activity.

Evidence

The issue of actually achieving the QOL outcomes through the display of "ideal-type" characteristics and through responsiveness to at least some of the six imperatives is now considered by examining evidence from the empirical literature. To provide focus but also some indication of diversity, the examination is restricted to three occasionally overlapping manifestations of AT (farm-based tourism, volunteer tourism, and community-based ecotourism) that have received substantial attention in the literature.

Farm-Based Tourism

Farm-based tourism is distinguished from the other two focus activities by its history and geography, being concentrated in the more developed world (and Europe in particular) and having been in existence as a formal sector, in several central European countries at least, since the late 1800s (Pearce 1992). Accordingly, it has had considerable time to be articulated as a viable, stable, and well-respected activity benefiting from proximity to large and prosperous markets, generous government support programs, and excellent infrastructure networks despite relatively peripheral locations. Vacation farms (as participating entities are widely known) were contextualized as a form of AT during the early 1980s (Dernoi 1983; Frater 1983), but only to the extent that they (a) are locally owned and operated (usually by on-site resident farmers), (b) engage in commercial farming as their primary purpose, and (c) include small-scale on-site accommodation. Some farm-based tourism associations, for example, designate an upper membership threshold of ten bedrooms. Accordingly excluded are large “factory farms,” wineries, theme park-type operations that cater to organized tour groups, and other “pseudo-farm” operations that like vacation farms are components of the broader “agritourism” sector. More flexibility is apparent in the provision of guest activities, which can range from participation in on-site farm labor and hunting or fishing to ecotourism-type excursions into nearby protected areas.

Economic and social contributions to vacation farm operator QOL are strongly evident in the literature. Revenue from tourism activities typically accounts for only a small proportion of gross income, with 72% of a sample of operators in England and Wales reporting a contribution of 5% or less (Winter 1987), and 53% of a German sample reporting 10% or less (Oppermann 1995). However, operators in almost all destinations concur that this supplementary income often provides the difference between viability and non-viability for the overall farm operation (Hjalager 1996; Ilbery et al. 1998; Nickerson et al. 2001; Ollenburg and Buckley 2007; Sharpley and Vass 2006; Weaver and Fennell 1997a, b), and allows them to remain on the property (Ollenburg and Buckley 2007; Sharpley and Vass 2006). The criterion of tourism as a crucial supplementary sector, as per Table 23.1, is thus broadly supported at the level of the individual operator, although related activity tends to be seasonal, with a summer/autumn peak.

An added consideration is the frequently reported practice, from Australia and Saskatchewan for example, of utilizing dwelling rooms vacated by children who have left home, or underused farm buildings (Ollenburg and Buckley 2007; Sharpley and Vass 2006; Weaver and Fennell 1997a). The literature is less clear about supplementary and multiplier effects at the regional level, although only minor benefits are indicated by low rates of participation (ranging from 3% to 6% in central European countries to considerably less than 1% in Canada, the US, and Australia (Weaver and Fennell 1997b)), dispersed patterns of distribution, and low individual visitor capacities.

As local ownership and operation is frequently a prerequisite for membership in farm-based tourism organizations, the “local ownership” parameter of accommodations in Table 23.1 is also inherently and strongly supported. There is further evidence, however, that the empowerment benefits from such ownership accrue disproportionately to the female partner, who typically leads this service role while the husband focuses on agricultural production (Busby and Rendle 2000; Frater 1983; Pevetz 1991; Weaver and Fennell 1997a). Data on market characteristics are insufficient to assess whether guests can broadly be characterized as allocentric, but operators in diverse destinations also report the role of farm-based tourism in helping to overcome social isolation through positive host/guest interaction. A survey of 250 Australian vacation farm operators yielded a very high agreement with the sentiment that they were motivated at least in part to become involved in farm-based tourism to “meet interesting people” (1.95 mean on a 5-point Likert scale where 1 = strong agreement) (Ollenburg and Buckley 2007). Once again, this effect

is reported to disproportionately benefit females, who are often the most negatively affected by rural isolation. A related benefit is pride reinforcement, with Australian owners concurring further (1.90 on the scale) that they are proud of their property and want to share it with others.

The smallness-of-scale issue, in addition to its crucial supplementary income effect, contributes to a high degree of product flexibility, with the dwelling often serving only as a home base for guests whose activities are mainly carried out on adjacent public or private land. Operators in Saskatchewan during the mid-1990s reported a gradual shift in their market from hunters and fishers to guests more interested in wildlife-watching opportunities (Weaver and Fennell 1997a), a transition that requires little or no investment in new facilities or services by the farm operator. Smallness of scale (and concomitant low investment costs) also indicates potential for a significant increase in participation rates among farm owners, although an unresolved issue is identifying an optimum participation rate that compromises between the provision of benefits to as many farmers and their suppliers as possible, and oversupply.

A final scale-related consideration is the difficulties an individual operator faces in trying to efficiently and effectively carry out simultaneous marketing and operational activities, a problem broadly associated with small and medium tourism enterprises (McKercher 1998). Austrian and German operators, benefiting from a century of experience with farm-based tourism, have partially resolved this problem by forming consortia, or groups of 10–20 farms that pool their resources to engage collectively in more effective marketing and management. Such cooperation is differentiated from the collective activities that are pursued by farm-based tourism associations, which may extend to lobbying government for reduced regulation and other favorable concessions. The issue of high regulation is interesting. Touted in Table 23.1 as a facilitator of QOL because it supposedly ensures the retention of conditions that provide benefits to local people, operators in various destinations cite increasing bureaucracy and regulation as one of the greatest impediments to their long-term success, necessitating diversion of resources and causing substantial stress, frustration, and discouragement (Weaver and Fennell 1997a; Ilbery et al. 1998).

Volunteer Tourism

As noted earlier, volunteer tourism (or more recently “voluntourism”) is distinguished by a high moral imperative to achieve positive outcomes for the target destination. Even more distinctive is the direct involvement of the tourist in realizing these outcomes, so that the “allocentric tourists” characteristic of Table 23.1 is especially important as a focus of analysis. Wearing (2001) captures this QOL/tourist nexus in applying the term volunteer tourism “to those tourists who, for various reasons, volunteer in an organized way to undertake holidays that might involve aiding or alleviating the material poverty of some groups in society, the restoration of certain environments or research into aspects of society or environment (p. 1).” This shows clearly, in addition, a core stakeholder triumvirate consisting of the volunteers, the affected local people, and the organizations that mediate interactions between the two. Topically, volunteer tourism can be divided between those activities focused on the social and cultural development of the population, and those focused on the destination’s natural environment, with most empirical investigations being directed to the latter. Geographically, case studies in the less-developed countries (LDC) are dominant, while peripheral locations (both rural and urban) within the more-developed countries (MDC) constitute a secondary area of attention.

When assessing the QOL benefits (or lack thereof) of volunteer tourism, it is useful to differentiate the sociocultural and environmental dimensions. In the latter, volunteers participate in various field activities which seek to understand and preserve or enhance the environment at the local, regional, and/or global level. These activities include data collection and rehabilitation

of habitat through removal of exotic vegetation and tree planting, as practiced in venues such as the Santa Elena rainforest in Costa Rica (Wearing 2001). The extent to which benefits for *local people* are additionally taken into consideration as an objective can range from negligible to full, the latter evident for example in scientific research to identify and eradicate the source of a debilitating local disease. Where in contrast consideration of sociocultural impacts is negligible, the outcome may be costly rather than just neutral, as when traditional hunting and gathering are banned in an area as a result of research identifying negative effects on local biodiversity from those activities. A cost/benefit analysis of such research, however, would need further to consider whether local people concurrently derive benefits such as employment and revenue.

Where the priorities and interactions are more clearly sociocultural, the QOL benefits to local residents – at least superficially – are more obvious. Volunteer tourist interventions can be indirect, as through the provision of education and training that imparts the knowledge and skills necessary for local residents to improve their own standard of living. The Tijuana-based Los Niños organization is a Mexican example that has been featured in the literature (McGehee and Andereck 2009). Direct interventions, in contrast, involve participation in activities that more immediately improve residents' QOL and in doing so create conditions that are conducive to self- and community improvement. An example is a volunteering ophthalmologist who performs eye surgery on a visually impaired resident firstly to improve their immediate QOL and secondly to maximize their longer term opportunities for gainful employment and social intercourse. The construction of infrastructure and other facilities, as through the Habitat for Humanity home-building program (Stoddart and Rogerson 2004), and participation in local livelihoods, as through initiatives in the 1970s to assist with the harvest of the Cuban sugarcane crop, are other manifestations of direct intervention.

Given its overt moral imperative, pervasive apparent altruism, and collective record of tangible QOL outcomes – Habitat for Humanity for instance claimed to have constructed over 100,000 houses by the early 2000s (cited in Weaver 2006) while McGehee and Andereck (2009) suggest ample anecdotal evidence, and their own research in Mexico, as to the positive benefits for local communities – it is unsurprising that volunteer tourism at least until very recently has escaped any critical scrutiny in the literature. Guttentag (2009) rightly emphasizes that attendant positive outcomes should be recognized and celebrated, but further argues that a more critical perspective is warranted so that potential costs, both inadvertent and advertent, can be identified and addressed or avoided.

Three contemporaneous critical overviews (Guttentag 2009; Raymond and Hall 2008; Sin 2009) reveal a constellation of potential negative impacts that indicate a worst-case-scenario syndrome of over-and-under commitment. Overcommitment occurs primarily at the organizational level and describes the pursuit of volunteer tourism for ulterior motives such as religious conversion or the quest for geopolitical allies. A cynic would argue accordingly that the “ecumenical Christian organization” Habitat for Humanity uses its high-profile home construction activities to proselytize, an accusation that is supported by its concurrent self-description as a “ministry” and its practice of presenting a bible to recipients of new homes (Habitat for Humanity 2010). The Peace Corps, similarly, could be accused of sending American volunteers abroad to improve the international image of the USA and thereby enhance its geopolitical self-interest.

It may be that the QOL of affected people is positively affected in the short term by the volunteer activities and perhaps even in the longer term by a new religious or geopolitical affiliation. However, those outcomes would appear from this perspective to be secondary to ulterior sponsor motives, including the self-preservation and self-perpetuation of organizations that are becoming increasingly professionalized and sophisticated (Simpson 2005), suggesting that the affected people are in essence being manipulated. Related intentional or unintentional outcomes include dependency and reinforcement of host/guest power disparities. The well-being of a local

community comes to rely on the episodic or continuous presence of a sophisticated organization and its revolving cohorts of well-off volunteers – a situation that can better ensure the realization of ulterior sponsor motives, while hindering the attainment of local empowerment.

The concurrent phenomenon of under-commitment occurs mainly at the individual scale. Considerable attention has been paid in the literature to the motivations, experiences, and reflections of volunteer tourists. A typical profile pertains to Earthwatch Australia participants, who have been described as passionate about helping the environment and eager to be challenged mentally and physically (Weiler and Richins 1995). Volunteers are variably described in terms of the substantial financial, temporal, physical, and emotional investments they make in planning and undertaking their volunteering experiences, indicating strong altruism. The alternative narrative, however, regards these participants as highly self-focused, the experience providing opportunities for *their* self-awareness, *their* personal development, and perhaps *their* guilt alleviation. This is reflected in a description of the volunteer tourism literature as highly narcissistic, being mostly focused on the experiences of the tourists rather than the affected hosts (Guttentag 2009). At best, Wearing (2001) acknowledges the reciprocal altruism that pervades the sector, with volunteers anticipating benefits both for the hosts and for themselves. Singaporean volunteers in a South African openly admitted that the motivation of traveling was more important to them than contributing to host community development (Sin 2009).

This narcissism translates into questionable QOL outcomes to the extent that volunteer placements tend to be one-time experiences that can produce unsatisfactory work outcomes due to insufficient skill, insufficient time, and a lack of self-commitment. Some New Zealand hosts of the WWOOF (Willing Workers on Organic Farms) program complained that many workers were lazy and unmotivated, and performed poor quality work, thereby diverting the time and resources of hosts away from the core business of farming (McIntosh and Campbell 2001). Where self-focus and lower quality work outcomes are evident (and not necessarily confined to the volunteers), the potential for reinforced cultural stereotypes and for cross-cultural misunderstandings and confrontations is enhanced (Raymond and Hall 2008).

Community-Based Ecotourism

It is widely accepted that ecotourism is differentiated from other forms of tourism by (a) its primary emphasis on nature-based attractions (which can range from entire ecosystems to their constituent charismatic megafauna and megafauna), (b) the provision of learning and educational opportunities relative to these attractions, and (c) management and planning that coheres with the evolving principles and practices of environmental, sociocultural, and economic sustainability (Blamey 2001; Weaver 2008). Ecotourism emerged formally in the early 1980s as a nature-based form of AT (see above), but has since evolved along two distinct paths. Dominant with regard to visitor numbers and revenue is ecotourism construed as sustainable mass tourism, exemplified by the five million annual visitors to Grand Canyon National Park (USA) and the increasingly “green” facilities, infrastructure, and services that facilitate and mediate encounters between visitors and the Park’s attractions. This mode occurs mainly in MDCs where large proximate markets and well-articulated infrastructure networks give rise to high levels of protected area visitation as well as the development of opportunities in unconventional spaces such as urban areas and other highly modified landscapes (Kontogeorgopoulos 2003; Weaver 2001, 2005).

The secondary mode is the continuation of ecotourism as AT. While present in economically developed areas, both its investigation in the literature and its pursuit as an object of development aid are focused overwhelmingly on economically peripheral areas, either within LDCs (e.g., Bolivia, Botswana, Vietnam) or in MDC spaces occupied by indigenous people (e.g., in Outback

Australia, Northern Canada, northern Scandinavia, Alaska, etc.). Notable in this manifestation is the centrality of local communities, hence the widely used label “community-based ecotourism (CBE).” Implicit in CBE is an expectation of reciprocal environmental and sociocultural benefits (Butcher 2007). For local people, these benefits include the equitable distribution of income (economic empowerment), elevated self-esteem and confidence (psychological empowerment), community cohesion and mobilization (social empowerment), and representative and responsive decision-making structures (political empowerment) (Scheyvens 1999). All purportedly derive from and in turn reinforce community influence over decisions to initiate, modify, or terminate relevant projects, the right to be consulted at all stages of the latter, preferred access to employment opportunities, and participation in ownership and management (Weaver 2008).

Benefits for the natural environment supposedly occur as local residents endeavor to protect and enhance the biophysical resources that attract the ecotourists who ultimately provide these positive returns – returns, moreover, that cannot be realized, or are realized only ephemerally, through farming, mining, commercial logging, or other alternative activities. Community support for proximate protected areas, for example, increased substantially in Belize following the establishment of ecotourism projects (Lindberg et al. 1996). The orthodoxy of CBE as an optimal pursuit for peripheral regions is reflected in the enormous number of such projects that have been spawned since the 1990s (Buckley 2003; Zeppel 2006). According to Honey (1999), just one governmental agency, USAID, was involved in 105 CBE projects during the mid-1990s, while this component was inserted in 32 of 55 projects undertaken between 1988 and 2003 by the World Bank to support African protected areas (Kiss 2004). Ecotourism projects within indigenous groups are almost invariably constructed as community-based initiatives.

While systematic and comprehensive analyses of the performance of CBE projects are lacking, there are anecdotal examples of successful outcomes. A Maasai village in northern Tanzania was credited with obtaining a sizeable (US \$25,000) and indexed annual rent from a company for the lease of its land for ecotourism, a bed-night fee of US \$3.15 for every ecotourist staying at the company’s ecolodge, and income from the community’s own campsite (Nelson 2004). This example demonstrates that control over and/or access to land with high ecotourism potential is one prerequisite for a successful operation, along with the discipline to reinvest rather than redistribute a substantial portion of income (Salafsky et al. 2001). Another consideration is the extent to which the affected “community” is well defined and internally collaborative, a situation that is associated with positive social capital (Jones 2005). Strong leadership, including a willingness to distribute benefits equitably and an ability to negotiate aggressively with government and private sector interests, was a major factor in the Tanzanian Maasai example cited above. Finally, partnerships are essential in so far as participating organizations are willing and able to provide start-up expertise and resources, as well as ongoing training that fosters increasing community capacity and independence (Fuller et al. 2005; Zeppel 2006).

That such a combination of facilitating factors does not often pertain to CBE is indicated by Buckley (2003), who speculates on the basis of a selection of initiatives that unqualified financial successes are “quite limited.” More tangibly, only 10 of 37 Asian operations funded by the Biodiversity Conservation Network were found to cover both their fixed and variable costs, while 13 covered only their variable costs, three generated minimal revenue, and four generated no revenue at all (Salafsky et al. 2001). It is apparent that CBE projects tend to remain viable only as long as partner organizations continue to maintain their funding and technical support, revealing a deep state of dependency that makes any tangible outcomes from these projects conditional and precarious. More tellingly, Butcher (2007) argues that CBE substantially constricts the development options of local communities, and hence QOL potential, by advocating the preservation of traditional cultures, and the nonconsumption of local natural capital. Such conditions, he argues, must be adhered to by local communities in order for them to receive support from CBE organizations.

Effectively, Butcher (2007) asserts that the environmental imperative is paramount in the goals and objectives of participating organizations, while the sociocultural imperative is manifest only in a patronizing belief that traditional cultures and social structures should be preserved at all costs. A perceived hostility toward capitalist and modernization impulses by participating organizations, as per the cautionary platform, assures accordingly that the economic imperative is framed only in the diminished terms of meeting the basic needs of all community members. However, rather than overcoming the dependency that is inherent in the modernization process, there is substituted a new dependency on the sponsoring organizations and their own ideological biases.

Butcher is supportive instead of a model that accepts the interdependencies and inequalities of a globalizing world – even the most hard core AT operation relies upon carriers and other agencies of conventional mass tourism and the modern world to gain access to guests (Pearce 1992) – but which harnesses human ingenuity and “trickle-down” effects from core regions to bring about continual improvements in the material well-being of local people in the periphery. Concomitant social and cultural change he regards as inevitable and desirable, the ideal of “sustainable tourism” becoming almost perverse when it serves to sustain a status quo replete with low material QOL indicators and dependency on a constraining ideology and its enabling organizations.

Discussion

Critiques of AT have been offered since the construct was first introduced. Murphy (1983), for example, cautioned that the community-based approach, to achieve positive QOL outcomes, must recognize that tourism is a highly competitive industry underpinned by the need for sound business principles and practices, and that the larger geopolitical jurisdictions in which the community is embedded have a legitimate stake in local level outcomes. Richter (1987) warned against the wholesale rejection or edification of either mass tourism or AT (the “either/or” approach), presaging the idea of sustainable tourism with an “appropriate tourism” model that advocates a combination of tourism traits best suited to each destination. Eadington and Smith (1992) argued similarly that it is easier to criticize mass tourism than to propose truly viable and practical alternatives that effectively address attendant issues such as poverty alleviation and empowerment. Ranck (1987) provided one of the first empirically based critiques of AT, describing how the development of guesthouses in a remote region of Papua New Guinea was accompanied by haphazard imitations, exacerbated clan rivalries, extremely low occupancy rates due to poor marketing and accessibility, inferior building standards, and unreliable food supplies. Notably, Ranck recommended that the then-current social structure and AT-styled guesthouses should be regarded as *transitional*.

Butler (1990) provided one of the best-known critiques, describing AT as a “pious hope” and also a Trojan horse that can undermine the people it is supposed to enrich. This critique conjures the dependency, intrusiveness, elitism, tourist narcissism, local rivalries, and other potential problems described above, and also the possibility of CBE serving to open the door to more intensive (and presumably less benign) forms of tourism as per the exploration and involvement stages of the tourism area life cycle. The metaphor is entirely valid in so far as it reflects the naivety and practical weaknesses of AT as well as the risk of intensified and unregulated tourism that follows. Less clear is the desirability or not of *regulated* tourism intensification. AT purists may object that any intensification is undesirable as it results in its replacement with another form of tourism – and eventually mass tourism – that is not as likely to achieve stated objectives of community empowerment and improved QOL for local residents.

Regulated Intensification

A less dogmatic perspective considers the potential benefits and variable modes of regulated intensification. One manifestation proposed here is *transactional AT*, which refers to operations that are deemed to meet demand best at the individual scale as smaller, AT-type products, but can benefit from the collective economies of scale created by forming alliances and conducting formal agreements and exchanges of information and goods (i.e., transactions) among recognized members of the collective. Transactional intensification, therefore, describes the retention of AT-type characteristics at the individual level while simultaneously creating mass tourism-type economies of scale through collective action. Vacation farms, and the Austrian sector in particular, provide the best model for this form of AT, their *desirability* being predicated on a personal encounter with a working farm and its owners, but their *efficiency* being enhanced by membership in a consortium-type structure that pools the resources of several operators within reasonable proximity of one another. Vacation farms, in addition, benefit from relatively well-articulated industry groups that project the collective self-interest in government negotiations and other forums. Again, the long-established vacation farm sector of central Europe is exemplary. A similar concept of balancing small and large scales of operation has been applied by Jones (2011) to the Mid-Wales Festival of the Countryside. Desirable QOL outcomes that are concurrently facilitated through transactional AT include the retention of local control and associated vernacular landscapes, as well as increased revenues and improved entrepreneurial capacity.

The second manifestation, which is not necessarily incompatible with the first, is *transitional AT*. As per Ranck's critique of guesthouses in Papua New Guinea, this assumes that a sustainable rate of growth and integration into the globalized space economy are desirable outcomes that facilitate real improvements in the material and nonmaterial QOL of residents in peripheral areas. Successful AT operations, accordingly, are encouraged to expand in a well-considered and regulated manner to meet market demand and realize their potential even possibly as sustainable mass tourism products, an option that is vetted by Weaver (2000) in his broad context model of destination development scenarios. Transitional AT further assumes that social structures and cultures are entities selective elements of which merit protection, but which must at the same time have the capacity to evolve and adapt in the face of changing external circumstances and exposure. Through this approach, remote and impoverished communities in countries such as Papua New Guinea are utilizing tourism to improve their access to infrastructure and services that might not otherwise be forthcoming in the absence of such a suitable economic stimulant (Ranck 1987). Tourist demand for selected aspects of traditional culture, as with the case of dance in Bali, ensures that some elements of the latter are retained (albeit in an often commoditized form) during modernization through a process of selective adaptation (Hitchcock and Darma Putra 2007).

Volunteer tourism and CBE initiatives are amenable to this mode because of the prospects it affords to substantially improve the material QOL of participating local communities as they are integrated into the world economy, while reducing their dependency on particular sponsoring organizations. As they expand, however, (and assuming that actual and potential demand is such that they *can* expand), it is possible that the product will diversify beyond ecotourism, and that a strict focus on community empowerment (allowing for the dependency argument) will give way to a broader structure of partnerships and collaboration involving co-empowered local residents, intermediaries, protected area managers, and government agencies. Such a structure, described by Weaver (2010b) as partnership-based tourism, should be strongly informed by the moral imperative so that all partners are motivated by the principle of reciprocal altruism.

Conclusion

As an ideal type, AT characteristics are often not practical to attain and do not fulfill their expectations with regard to QOL outcomes. Heralded with much idealism and enthusiasm in the early 1980s (like mass tourism 30 years earlier) and by many even today, it seems increasingly clear that these outcomes are more likely to be achieved when the ideal type gives way to a thoughtful and regulated hybridization with enabling mass tourism characteristics such as larger economies of scale and integration into broader tourism systems. AT reconceptualized as such can be a *transitional* state morphing into an intermediary gray zone (with sustainable mass tourism as a probable future option) and/or a *transactional* state retaining a combination of the best “black” (AT) and “white” (mass tourism) traits. Overviews of farm-based tourism, volunteer tourism, and community-based ecotourism indicate that the structures, benefits, challenges, and appropriate modes of development vary considerably beneath the AT umbrella.

Absent, however, are comprehensive and rigorous investigations of outcomes associated with these and other manifestations, necessary so that further analysis can be informed by more than anecdotal evidence. Such investigations may be easier to carry out in the farm-based tourism sector given the existence of well-articulated membership-based interest groups and good accessibility. Volunteer and CBE operations, in contrast, lack such umbrella organizations in most countries, while data collection is complicated by the involvement of many individuals within the community rather than a single operator. Concurrently, it is vital especially in the latter two cases to solicit affected local residents – preferably through in-depth ethnographic inquiries – to gauge their own perception as to the QOL benefits being gained. Consistent with their ideological biases, sponsoring organizations largely assume that local residents desire a small-scale community-based approach that preserves traditional cultures and livelihoods. It may be, however, that some or most residents aspire to a standard of living closer to that enjoyed by their guests and recognize the enabling qualities of a more intensive mode of tourism development. The identification and study of innovative operations which already demonstrate hybridization through transactional or transitional AT, therefore, constitutes one further area of follow-up research, toward the creation of prototypes that can be more widely adopted. At both the theoretical and practical level, it would be additionally fruitful to demonstrate how the concrete implementation of transitional and transactional AT strategies can be represented by a modified version of the conventional tourism area life cycle that optimizes QOL outcomes for local people and other stakeholders.

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Chapter 24

Building Social Capital to Enhance the Quality-of-Life of Destination Residents

Gianna Moscardo

Introduction

Tourism is often promoted and used as a development tool by governments and aid and conservation agencies. Typically this is based on claims about the economic benefits tourism may bring to destinations and their residents. The United Nations World Tourism Organization (UNWTO 2010, p. 1), for example, describes tourism as the ‘fastest growing economic sector’ producing ‘economic and employment benefits’. Whilst the World Travel and Tourism Council (WTTC 2010) describes the value and importance of tourism using employment and revenue statistics. Tourism is presented as a generator of income and employment and this in turn is seen as a driver for other benefits for destination residents.

This argument is based on what Costanza and colleagues (2010) call the ‘empty world’ model of economies. In this model the well-being of individuals is based upon their consumption of goods and services which is supported by increasing financial and manufactured capital. According to these authors, the alternative and more sustainable approach is a ‘full world’ model in which the Quality-of-Life for individuals and well-being of communities is based on benefits derived from a number of different forms of capital. In this model, an activity must be assessed based on its impacts on a range of forms of capital in order to determine its overall value to an individual or community. This chapter will argue that such an approach could be particularly valuable for assessing tourism. It will begin by briefly setting out a full world, Quality-of-Life (QOL) framework for assessing tourism and its impacts which looks at a number of forms of capital and the ways in which these can be enhanced or depleted by tourism. It will then focus more specifically on destination residents and on one of these forms of capital, social capital. After defining and describing social capital, the chapter will examine how tourism can affect the social capital of destination residents and conclude with a discussion of how tourism could be used to build social capital.

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A Quality-of-Life Framework for Assessing Tourism Impacts

The concept of Quality-of-Life (QOL) has a long history of use in medicine and related health fields and, in more recent times, has become of growing interest to those attempting to understand the benefits of different forms of development. In this latter case, Diener and Suh (1997) argue that when we talk about QOL we are usually considering the idea of a 'good life' and that there are three different philosophical perspectives on this idea of a 'good life' resulting in three different approaches to measuring QOL. First, there is the idea that a good life arises from a good society, one free of crime, ill health, ignorance and oppression. In this approach, QOL can be seen as measured by various social indicators such as levels of education, crime rates, participation in governance and health-related statistics. Second, there is the idea that a good life arises from choice or the freedom to pursue your individual preferences. This perspective underpins an economic approach to QOL where choices are made possible through wealth and economic opportunity. In this case, QOL is measured by economic indicators such as income and financial capital. Finally, there is the view that a good life is one where people perceive themselves as being happy and satisfied. This leads to the subjective well-being approach to QOL (Diener and Suh 1997).

As Diener and Suh (1997) also note, it could be argued that the first two approaches above should make people happy. That is, we would expect some correlations between these measures and subjective well-being. Typically there are positive correlations but they are not perfect, and in particular the wealth and income measures seem to have only limited ability to predict the subjective well-being measures (Diener and Suh 1997). It is these problems that have led to more recent definitions placing either limited or no emphasis on the financial indicators. The OECD (2005, p. 1), for example, defines QOL as 'the notion of human welfare (well-being) as measured by social indicators rather than by 'quantitative' measures of income and productions'. But such definitions are vague and do not make explicit what does or does not contribute to QOL. Costanza and colleagues (2007) provide a more detailed definition of QOL that takes into account all three perspectives and provides a mechanism for understanding how QOL can be derived from different social conditions. This definition is as follows – 'Quality-of-Life (QOL) is the extent to which objective human needs are fulfilled in relation to personal or group perceptions of subjective well-being' (Costanza et al. 2007, p. 269).

What then are the basic human needs? Costanza's group (2007) define these as: subsistence, reproduction, security, affection, understanding, participation, leisure, spirituality, creativity, identity and freedom. Sirgy (2002) provides a review of various discussion of QOL identifying sets of needs that range from 5 to 16. Despite this variety, there are some common themes in these different lists (Moscardo 2009). More specifically it can be suggested that QOL depends upon the extent to which individuals can meet their needs in the following four areas:

1. Physiological needs which include subsistence, good health and physical protection from harm
2. Security which refers to a stable place to live and work
3. Belongingness or the ability to make and maintain social relationships and opportunities to engage in social, cultural and political activities
4. Self-esteem based on knowledge and confidence, and the ability and freedom to make choices

(derived from lists provided by Cummins 1996; Alkire 2002; Sirgy 2002; Clarke et al. 2006; Costanza et al. 2007; Malkina-Pykh and Pykh 2008).

Vermuri and Costanza (2006) then argue that to meet these needs, individuals and groups need access to different forms of capital including social, human, physical, financial and natural.

Table 24.1 Summary of forms of capital

Form of capital	Summary description
Financial	Monetary assets and resources that offer opportunities to invest in other activities
Built	Physical infrastructure including transport, building and public facilities that support communal activities
Natural	The services and resources provided by natural environments/ecosystems
Human	The assets and resources individuals have to use based on their health, skills, knowledge abilities and access to other forms of capital
Political	Access to, and influence on, power systems, decisions and political representatives
Cultural	Stock of values, arts, crafts, cultural knowledge, performance and access to heritage resources
Social	Quantity and quality of social connections between people

Sources: Emery and Flora (2006) and McGehee et al. (2010)

Lehtonen (2004) suggests that one way to assess the sustainability of different development options is to take a ‘capitals approach’. In this approach, sustainability is seen ‘as the maintenance or increase of the total stock of different types of capital’ (Lehtonen 2004, pp. 200–201). There are some who are critical of the idea of taking the economic concept of capital and applying to other realms (see Macbeth et al. 2004; Lehtonen 2004, and Adler and Kwon 2002 for discussions of, and responses to, these issues), but Lehtonen (2004) concludes this is an approach that is easier to use in practice and in particular allows both for better integration of the different sustainability dimensions and a more detailed consideration of the social dimensions.

Macbeth and colleagues (2004) argue that Bourdieu was one of the earliest authors to take the concept of capital into a wider range of area beyond the economic or financial sphere. This idea has since been used by others and expanded. Table 24.1 lists and briefly describes the seven most common forms of capital that can be found in the literature. In particular these seven make up Flora’s Community Capitals Framework (Emery and Flora 2006) highlighting the convergence between these types of capital and the factors listed in the literature on effectively building community capacity to control and benefit from development.

Moscardo (2009) has argued that this capitals approach could be a more useful way to examine and assess tourism impacts than has been previously used. A number of authors (Brunt and Courtney 1999; Fagence 2003; Ioannides 2003; Saarinen 2006; Wall and Mathieson 2006) have been critical of the existing approaches to analysing tourism impacts noting in particular the dominance in this area of studies into resident perceptions of tourism impacts and their attitudes towards tourism development in general (Moscardo 2008). Whilst this research may provide valuable insights into understanding perceptions of impacts, it can be seen as having two main weaknesses with regard to explaining the impacts themselves – a tendency to assume that perceptions of impacts equate to actual impacts and a focus on explaining the perceptions of impacts by analysing characteristics of the residents rather than by examining the features of tourism (Andereck and Nyaupane 2010; Moscardo 2008). In the former case, it is important to understand that residents may not always be aware of the full range of tourism impacts, and it is also possible that perceptions of tourism impacts may reflect media attention or social representations rather than actual impacts (Pearce et al. 1996; Saarinen 2006). In the latter case, Brunt and Courtney (1999) and Andereck and Nyaupane (2010) argue that this research into resident attitudes rarely considers in detail the links between perceived impacts and features of tourism. This concentration on connecting resident perceptions to resident characteristics, such as length of time in the region and level of contact with tourists, means that little is actually reported on the processes by which different forms of tourism contribute to, or result in, different actual impacts.

Table 24.2 Examples of links between tourism impacts and destination resident capital

Capital	Positive tourism impacts or contributions	Negative tourism impacts or depletions
Financial	Creation of jobs, business opportunities and through these income for destination residents	Increases in the costs of living for destination residents
Built	Building of transport infrastructure to support tourism which provides greater opportunities for other economic sectors in the destination	Damage to transport infrastructure because of increased usage for tourism
Natural	Resources and support are provided for the conservation and restoration of natural environments that serve as tourist attractions	Tourist populations increase resource use (e.g. energy and water) and waste
Human	Provision of training and education for residents working in tourism	Tourists bring diseases with them into destinations creating health problems for residents
Cultural	Incentives from the interest of tourists for the preservation of cultural traditions	Destruction of built cultural heritage to make way for tourism facilities
Political	Tourism interest in ethnic minorities or marginalised indigenous populations at destinations can support greater political power for these groups	Transnational tour operators who can control the flow of tourists to a destination can be given political power and advantage by elected representatives
Social	Tourists can support traditional festivals and events that bring destination residents together and strengthen social connections	Controversial tourism developments can create social conflict that breaks down social connections

Impact examples taken from reviews of tourism impacts provided in Wall and Mathieson (2006) and Mason (2008)

There have been some exceptions to this with recent work by Andereck and Nyaupane (2010) specifically defining Quality-of-Life in terms of different domains and examining the links between tourism development and these domains. In addition, work by Macbeth et al. (2004) and McGehee et al. (2010) has linked tourism development to aspects of social, cultural, political and other forms of capital. Based on a similar line of reasoning Moscardo (2009) proposed a QOL framework for examining tourism impacts. This QOL framework for understanding tourism impacts argues that different types of, or approaches to, tourism development can have different impacts on the various forms of capital held by the key stakeholders in tourism. The five main stakeholders described in this framework are:

- The tourists
- The residents of the regions tourists live in and leave from (generating regions)
- The residents in the regions tourists move through on their way to and from destinations (transit regions)
- The residents of the destination regions
- The people who work in tourism

For each of these groups, tourism can impact on the various forms of capital in different ways. Moscardo (2009) provides an example of the implementation of the QOL framework by analysing the different ways in which the experience of travel can detract from, or add to, the stocks of different capital available to individual tourists. This framework can also be used to examine the relationship between tourism and the QOL of destination residents. Using the brief descriptions of the different types of capital provided in Table 24.1 and existing descriptions of tourism impacts, it is possible to suggest examples of how tourism impacts can be linked to specific forms of capital. Table 24.2 provides a list of these suggested examples.

The examples provided in Table 24.2 show some possible links between tourism and different types of capital, but it is still a descriptive approach. Further, Wall and Mathieson (2006)

and Brunt and Courtney (1999) have argued that the greatest attention has been paid to the environmental and economic impacts of tourism, with much less analysis conducted on the social dimension.

These concerns therefore direct attention to the human, cultural, political and social forms of capital with a particular emphasis to be given to understanding the processes and mechanisms that link features of tourism to elements and dimensions of the forms of capital. As noted in the introduction, this chapter is particularly concerned with social capital. To better understand the potential interactions between tourism and social capital, it is important to have a detailed understanding of what social capital is, where it comes from and what it supports.

What Is Social Capital?

This section will review definitions of social capital from a range of different disciplinary approaches with the aim of identifying common themes and elements. This section will also describe the different dimensions of social capital, its antecedents and its consequences for both individuals and communities.

Defining Social Capital

Hirsch and Levin (1999) have proposed a life-cycle model for academic concepts, and Adler and Kwon (2002) have argued that the social capital concept can be seen as being in the ‘emerging excitement’ phase characterised by widespread application and attention including from policymakers and the media. The challenge now is to move into and survive the ‘validity challenge’ phase (Adler and Kwon 2002). There is no doubt that within both its home disciplines of economics and sociology and the applied areas of politics and development studies, social capital is a contentious concept subject to considerable debate and critique (Pawar 2006; Portes 1998; Putnam 2001; Stone 2001). Indeed, some have gone so far as to suggest that it may not be a useful term, and both academics and practitioners might be better served to identify and focus separately on the elements that have been proposed as part of social capital (Pawar 2006).

Given this context, it is important to examine and understand the development of this concept. The reader is also directed to more detailed critical reviews provided by Adler and Kwon (2002), Pawar (2006), Portes (1998), Stone (2001) and Woolcock (1998). To begin this review of the development of the social capital concept, it is useful to have a general idea of what is being discussed. Earlier in this chapter, a very brief definition was offered from Emery and Flora’s (2006) summary which describes social capital as the quantity and quality of social connections between people. According to Pawar’s (2006) quantitative analysis of existing definitions, the words most commonly used in social capital definitions are trust, networks, collective action, norms, relationships, attitudes, cooperation, values and social interaction, confirming the focus on social connections between people. But such summaries do not do justice to the complexity of the concept.

Table 24.3 provides some of the most commonly cited definitions of social capital presented in historical order. The earliest definitions of Bourdieu (1986), Coleman (1988) and Burt (1992) were focussed on the individual and sought to broaden discussion of economic theory to recognise the value of social relations and connections. In these definitions, there is an emphasis on how individuals can use their social connections or structures for personal benefit; how they can transform social capital into economics or human capital. Subsequent

Table 24.3 Commonly cited definitions of social capital

Definition	Source
'is the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance and recognition'	Bourdieu (1986), p. 51
'is defined by its function. It is not a single entity but a variety of different entities, with two elements in common: they all consist of some aspect of social structures, and they facilitate certain actions of actors – whether persons or corporate actors – within the structure'	Coleman (1988), p. 98
'friends, colleagues, and more general contacts through whom you receive opportunities to use your financial and human capital'	Burt (1992), p. 9
Consists of 'those expectations for action within a collectivity that affect the economic goals and goal-seeking behaviour of its members, even if these expectations are not oriented toward the economic sphere'	Portes and Sensenbrenner (1993), p. 1323
'features of social organization such as networks, norms and social trust that facilitate coordination and cooperation for mutual benefits'	Putnam (1995), p. 67
'the information, trust and norms or reciprocity inhering in one's social networks'	Woolcock (1998), p. 153
'goodwill available to individuals or groups. Its source lies in the structure and content of the actor's social relations. Its effects flow from the information, influence, and solidarity it makes available to the actor'	Adler and Kwon (2002), p. 2002

definitions from Portes and Sensenbrenner (1993) and Putnam (1995) placed an emphasis on the collective rather than the individual and the consequences of social capital for public good and collective action. Definitions of social capital vary according to disciplinary background, level of analysis and the problem to which it is being related (Adler and Kwon 2002; Pawar 2006; Woolcock 1998).

Putnam's (1993, 1995, 2001) work in particular has brought the concept into the wider public arena and generated interest in the value of social capital for understanding community decline and development. Putnam's use of the concept has also generated substantial criticism from numerous authors led by Portes (1998; Portes and Landolt 2000). The first issue is that of confusion about what social capital is versus what it does, and this often arises from attempts to measure social capital. A number of authors (Pawar 2006; Portes 1998; Portes and Landolt 2000; Robison and Flora 2003; Stephens 2008; Stone 2001; Woolcock 1998) have been critical of attempts to examine social capital by measuring its outcomes, noting that this results in a tautology where social capital is measured by its outcomes and then shown to be related to those outcomes. This confusion between what social capital is and what it can do contributes to the second issue in which social capital is typically assumed to have mostly or exclusively positive outcomes (Portes and Sensenbrenner 1993; Stephens 2008; Woolcock 1998). This can contribute to poor policy decisions which ignore structural barriers and inequalities of opportunity and resources (Portes and Sensenbrenner 1993; Stone 2001; Woolcock 1998). According to Stephens (2008), these two misinterpretations of social capital contribute to a tendency to blame the poor for being poor, arguing that poverty is the result of their lack of social capital.

Thus, it is important to define and measure social capital by what it is, clearly distinguishing its features and structures from its processes and outcomes. The final two definitions in Table 24.3 from Adler and Kwon (2002) and Woolcock (1998) are attempts to make these distinctions and to combine the different levels of analysis and types of focus. It is these two definitions that are used in the rest of the present discussion. In addition to having a formal definition of social capital, it is important to recognise and outline the features or dimensions of social capital and how these might combine to result in its proposed outcomes (Portes 1998; Stone 2001; Grootaert and Bastelaer 2001; Woolcock 1998).

Table 24.4 Features, dimensions and types of social capital

Features, dimensions or types	Source
Obligations, expectations and trustworthiness of social relations	Coleman (1988)
Information channels available through networks	
Social norms adopted from groups	
Bridging – ties within social groups or internal linkages	Putnam (2001)
Bonding – ties between social groups or external linkages	Blanco and Campbell (2006) Beugelsdijk and Smulders (2003)
Opportunities for transactions both within and between networks	Adler and Kwon (2002)
Motivations for transaction based on internalised group norms, obligations from reciprocal exchanges and trust	
Ability or the competencies and resources available through networks	
Informal associations (reciprocity, cohesiveness and bonding)	Woodhouse (2006)
Bridging – ties between social groups	
Community engagement	
Trust	Rutten and Boekema (2007)
Relationships	
Networks and their features	
<ul style="list-style-type: none"> • Trust • Reciprocity • Interactions • Density • Engagement • Structure 	Stone (2001)
Individual capacity and competency	
Structure of social relations	
<ul style="list-style-type: none"> • Types of networks • Size and capacity of networks • Structural features of networks 	
Quality of social relations	
<ul style="list-style-type: none"> • Norms of trust • Norms of reciprocity 	

Dimensions and Operations of Social Capital

There are two ways to identify the dimensions and operations of social capital – a review of discussions of social capital and its measurement that identify and list its features and dimensions and an examination of proposed conceptual frameworks. Table 24.4 provides a summary of common elements listed as features of social capital or presented as forms of social capital. As with the definitions presented in Table 24.3, there is considerable overlap in the words and phrases used, but also considerable confusion between what is included as a feature of social capital versus a mechanism for its use (Woolcock 1998; Portes 1998; Van Der Gaag and Snijders 2005). This is especially true of networks. Some discussions have networks as features of social capital, whilst others have them as mechanisms that generate social capital and offer opportunities for its use. The present discussion prefers that latter approach favoured by Adler and Kwon (2002), Portes (1998) and Woolcock (1998) where the existence and nature of networks is an important condition for generating and using social capital but is not the social capital itself. This distinction is important because it recognises that in some situations, an individual may have access to and actively engage in robust, cohesive, stable and extensive networks but the members of the networks may not have access to resources or information that can be used (Portes 1998; Stephens 2008). In such a case, the network and ties exist, but there may be no social capital.

Woolcock (1998) proposed a descriptive framework to organise and connect the different features of social capital. In this framework, social capital can work at either the micro level for individuals and smaller, less formal groups or the macro level of formal organisations and civic institutions. At the micro level, social capital operates through two mechanisms – integration and linkage, whilst at the macro level, it works through the mechanisms of synergy and organisational integrity. Integration refers to the level of intra-community ties or bonds, and linkage refers to extra community networks. These are the forerunners of Putnam's bridging and bonding forms of social capital (Putnam 2001). Synergy refers to the quality of state-society relations or the interactions and exchanges between state institutions and citizens. Organisational integrity refers to the coherence, competence and capacity of state institutions.

Grootaert and Bastelaer (2001) offer a similar model which recognises three levels at which social capital operates and two sets of features that combine to produce different outcomes. The three levels are similar to those proposed by Woolcock (1998) and include the micro or individual and family level, the macro or formal institutional level and a middle or meso level of structures that link individuals to the more formal organisations. The two sets of factors in this model are structural and cognitive. Structural features of social capital include information sharing, collective action and decision making, rules and behaviours, whilst cognitive features are norms, shared values and trust.

In both this framework and that proposed by Woolcock (1998), social capital is not the networks or social groups, but the features of these networks or social groups. This is consistent with the definitional stance taken previously and with the final theoretical approach to be reviewed, that proposed by Portes (1998). In this model, there are four sources of social capital:

- Value introjection or internalised norms
- Bounded solidarity or identification with a group
- Reciprocity exchange
- Enforceable trust

These sources of capital can be accessed by individuals through their membership and participation in networks and other social structures in order to generate benefits. Like Woolcock's (1998) model, the differential operation of these sources results in different consequences or outcomes, as well as in different implications for policies aimed at building social capital.

Outcomes of Social Capital

According to Woolcock (1998), the four social capital dimensions of integration, linkage, synergy and organisational integrity combine in different ways to create different outcomes for communities. Where all four dimensions are low or nonexistent, we should find 'anarchic individualism', but if all four are present, then we should have 'beneficent autonomy'. Various combinations between these two extremes can result in a range of different outcomes. This need to find a way to explain a range of outcomes is important in the social capital literature because there has been a somewhat naive tendency to assume that social capital is automatically positive and generates benefits for both individuals and groups (Woolcock 1998).

At the level of the individual actor, social capital can be linked directly and indirectly back to Quality-of-Life (Requena 2003). Social capital can be seen as directly satisfying needs related to belongingness and social engagement, thus contributing to individual subjective well-being. Social capital can also be converted into economic and human capital through access to financial resources such as loans, business connections and knowledge from others (Bourdieu 1986; Coleman 1988).

But these benefits from group and network connections come at a cost. First, the development and maintenance of these social relations takes time and effort which can detract from time to spend on personal business or work interests (Beugelsdijk and Smulders 2003). Second, strong bonds or within group ties can also come with restrictions on individual behaviours which can stifle innovation (Portes and Sensenbrenner 1993). Third, the ties that can generate access to financial resources such as loans also bring with them expected reciprocity in terms of provision of benefits back to other group members who can become free riders (Portes and Sensenbrenner 1993).

At the macro or civic level, it can be argued that strong networks and group bonds support positive social behaviour based on collective decision making, effective social control and adherence to norms (Putnam 1995; Blanco and Campbell 2006). These civic outcomes are consistent with Diener and Suh's (1997) good society view of QOL. Further, these outcomes contribute to individual QOL by addressing needs related to security.

But strong identification with groups can also lead to conflict between groups (Woolcock 1998) and reluctance to engage in cooperative behaviours with other groups (Beugelsdijk and Smulders 2003). Stephens (2008) provides an example of a similar problem, describing the emergence of strong social ties for groups opposed to various government actions. In this example, strong bonding social capital was connected to a 'sense of embattlement' (p. 1182) and supported ongoing tension and conflict. As Robison and Flora (2003) note, social capital can be a source of power within groups, and the exercise of such power is not always benevolent.

This discussion highlights some of the dilemmas faced by policymakers with regard to social capital. Under the right circumstances, social capital can support positive economic and social behaviours that can generate benefits for regions, but equally a different set of conditions can lead to very negative outcomes. Evidence from studies of regional development and business effectiveness suggests that different aspects of social capital can support different activities at different stages of development (Beugelsdijk and Smulders 2003; Inkpen and Tsang 2005; Woolcock 1998). More specifically, it seems that strong internal ties or bonding can be helpful in developing small-scale local initiatives in the early stages of development, but these need to be supplemented or balanced by a move to bridging or external ties as entrepreneurial activities get better established (Coleman 1988; Woodhouse 2006). Other research indicates that looser networks support greater innovation and knowledge transfer, but give knowledge brokers more power (Burt 1997).

Portes and Landolt (2000) conclude it is difficult for policymakers to build social capital and to predict the consequences of their strategies related to social capital. But they do suggest some actions that can be taken to support the maintenance or enhancement of social capital and describe conditions that can encourage its use for positive outcomes. First, they argue that new businesses need to focus on ensuring they build trust by meeting their obligations and supporting reciprocal exchanges. Second, it is important to acknowledge and seek benefits for all and to reinforce existing social ties (Portes and Sensenbrenner 1993). Similarly, Bourdieu (1986) suggests that social capital can be enhanced by support for rituals, exchanges and mutual recognition that builds networks and groups. Finally, Woolcock (1998) takes an alternative stance listing the conditions that erode social capital, including:

- Class, sex and ethnic inequality
- Poverty that is endemic and difficult to escape even with stable employment
- Weak or poorly enforced laws
- Few serious electoral choices
- An absence of shared benefits from collective action
- No basic sense of order

Tourism and Social Capital

The previous section has established a definition of social capital, set out some of its features, conditions, mechanisms and consequences and highlighted some of the challenges in understanding how businesses and economic development programmes can build and use social capital for positive outcomes. This section will examine in more detail how the concept of social capital has been linked to tourism. Links between tourism and social capital are relatively recent and can be seen as falling into three main areas – discussions of the social capital of individual tourists, analyses of the interactions between tourist business activities and the implications of these for social capital and considerations of the role of social capital in the links between tourism and peripheral or rural regional development.

In the first area, the focus has been on how participation in tourism can generate social ties and, through these relations and networks, social capital for the individual tourist. Examples of this approach can be found in Heimtun (2007), Minnaert et al. (2009) and Moscardo (2009). In each of these analyses, the main contribution of tourism to social capital was through meeting and building relationships with new people, the creation of new social networks and bridging capital. In Moscardo (2009) and Heimtun (2007), these new social networks were mostly other tourists, whilst for the Minnaert et al. (2009) study of social tourism programmes for low income groups, the new social networks included staff in the agencies that organised the travel. In all three cases, the social networks did provide access to knowledge and other components of social capital. Minnaert et al. (2009) also provided evidence that the travel experience strengthened family or bonding capital. Similar analyses and results have been presented in the broader areas of leisure and recreation (Glover and Hemingway 2005; Warde et al. 2005). As is often the case with social capital, the main focus of these papers was on the positive contributions of travel to the social capital of the tourist. But as with other discussions of social capital, there are also costs. Moscardo (2009) found evidence that time spent away from home could be linked to a decline in social networks at home with a subsequent decrease in bonding social capital and a loss of group identity and connection that could be seen as threatening Portes' (1998) bounded solidarity.

In the second area are analyses of cooperative efforts between tourism businesses. Wang and Xiang (2007) reviewed research into collaborative destination marketing activities and argued that businesses that engaged in such activities are able to build social capital. In the resulting framework, Wang and Xiang (2007) argue that social capital is generated because collaborative marketing requires and reinforces trust, good will, a belief in common or shared benefits and relationships based on reciprocal exchange. A similar pattern of results is reported in a study of hotel networks and their participation in destination marketing (von Friedrichs Grangsjø and Gummeson 2006).

The third area, and one most relevant to the present discussion, is that of the relations between social capital and tourism development in rural/peripheral regions. Within this area, two streams of research explicitly recognising social capital can be identified – discussions of the interactions between tourism development and social capital and analyses of the impacts of festivals and events on host communities.

McGehee and colleagues (2010) and Macbeth and colleagues (2004) provide the most detailed considerations of the links between social capital and tourism development. Both discussions emphasise the importance of social capital within the destination community for the effective development of tourism. Existing social capital is said to support tourism in six ways:

- Information sharing, which is necessary for the development and management of tourist experiences and the identification of tourism opportunities (McGehee et al. 2010; Macbeth et al. 2004)
- Coordination of activities which supports effective tourism practice (McGehee et al. 2010; Macbeth et al. 2004)

- Collective decision making and problem solving which is necessary for effective tourism management (McGehee et al. 2010; Macbeth et al. 2004)
- Facilitation of business transactions which contributes to improved productivity (Macbeth et al. 2004)
- Pride in local culture and heritage which supports attractions for tourists (Macbeth et al. 2004)
- General community well-being which both encourages locals to be receptive to tourism and creates a positive environment that is attractive to tourists (Macbeth et al. 2004)

McGehee et al. (2010) then go on to analyse the links between social and other forms of capital within a particular rural area providing evidence to support claims about the linkages between social capital and effective rural tourism development. Macbeth et al. (2004) take a different direction arguing for a more active role for tourism development in community capacity building. They propose that if social capital is an important support for effective tourism, especially community-based tourism, then those involved in tourism development have a responsibility to try and build and enhance destination community social capital. To that end they suggest activities such as partnering with existing organisations (thus building bridging social capital), finding and supporting effective mechanisms for resident participation in tourism decisions and offering reciprocity by supporting a range of local cultural and social activities beyond just those directly connected to tourism (thus building bonding social capital).

This relationship between cultural and social activities and the social capital of communities is a core argument in the reviews and models proposed for understanding and evaluating the impacts of festivals and events on host residents (Moscardo 2007; Arcodia and Whitford 2006). Three types of resident participation in festivals and events are described and linked to an aspect of social capital. First, there is what Arcodia and Whitford (2006) refer to as the celebration and cohesion aspects of festivals. Residents who attend or participate in festivals and events are involved in the rituals that support strong intra-group ties and identity, or bonding social capital, and this can happen for families and immediate social groups as well as for a broader community identity (Moscardo 2007). Second, residents who volunteer to help in the running of festivals and events can use the social networks developed around the event for learning and skill development and can develop bridging capital for later use (Moscardo 2007). Third, there are the residents involved in the management and coordination of the event, and like volunteers they can build bridging capital through new social ties (Moscardo 2007). Arcodia and Whitford (2006) refer to this as community resources.

Misener and Mason (2006) provide a similar review focussed on sporting events but adding a set of principles for sporting event development and management that can actively enhance the building of host community social capital. These include keeping community values central to the nature of the event, involving residents as much as possible in all aspects of the event, putting a local organisation in charge of the event and being careful to avoid social exclusion and local power broking. These propositions acknowledge the possibility of events having a negative impact on social capital. Moscardo (2007) also describes negative impacts of events highlighting issues around conflict about the nature of event and raising the possibility that a failed event could have serious detrimental consequences for social capital.

In summary, this review of the currently available literature linking tourism to social capital provides support for the proposal that social capital could be a valuable concept to use to improve our understanding of both how tourism uses social capital, especially in remote, rural or peripheral regions, and how tourism impacts on the social capital available to the residents of these regions. But as McGehee et al. (2010) note, this is an area in its very early exploratory stages, and more research is needed to better understand the mechanisms and processes that link aspects of tourism development to the social capital of destination residents.

A Case Study Analysis of Tourism, Social Capital and Destination Residents

The Research Question

In order to address this identified need for more research in this area of tourism and social capital, a case study analysis was conducted. This analysis used a database of 328 case studies of tourism development processes and outcomes in rural, remote and peripheral destination regions, and was conducted according to guidelines for case study research proposed by Eisenhardt (1989) and supported by Patton and Appelbaum (2003) and Riege (2003). The first step was the definition of the research question which was to identify ways in which tourism development uses and impacts upon the social capital of destination community residents.

Possible Useful Constructs

The second step was the identification of useful *a priori* constructs. The reviews of both the social capital literature in general and the existing tourism and social capital literature provide a starting point in terms of possible linkages. Table 24.5 provides a list of conditions and mechanisms that tourism development can impact on, with some suggested positive and negative impacts for each.

Three points need to be made about the lists in this table. First, the list of conditions is an amalgamation of points made by Portes (1998), Coleman (1988), Woolcock (1998) and Grootaert and Bastelaer (2001). Second, this list does not include networks even though many approaches to social capital focus on networks. This chapter adheres to the view that networks are not part of social capital, but rather the mechanisms through which social capital is generated and used. Social networks can be seen as necessary but not sufficient conditions for social capital. Finally, the impacts listed in the second and third column are suggested only and provide a starting point for exploring the case studies, not a definitive list to be tested.

Sampling of Cases

The third step involved theoretical sampling of the case studies for analysis. In the present case, the sampling of case studies was conducted in three stages. In the first stage, all the case studies which included some discussion of social and cultural impacts or which included concepts that might be related to social capital were selected. The related concepts were social cohesion, cooperation, collaboration, trust, reciprocity, social ties, social relations, social networks, entrepreneurs, collective action, social norms and social conflict. This resulted in a subset of 80 cases which were examined further. Of these 80, 10 were found to explicitly consider social capital, and these were selected for more detailed analysis. Another 10 were randomly chosen to create a total sample of 20 cases which was a more manageable dataset for analysis. Table 24.6 provides some basic information about the case study sample including region and type of tourism. As can be seen, the 20 cases came from a variety of different places and covered several different types of tourism. All 20 cases used a mixture of ethnographic methods including interviews, participant observation and analysis of records and secondary data.

Table 24.5 Suggested impacts of tourism on destination social capital

Features of/conditions for social capital	Suggested tourism impacts	
	Positive	Negative
Integration, bounded solidarity or bonding capital (within group ties)	Development of effective coordination groups as part of tourism development can strengthen bonds Additional resources resulting from successful tourism ventures add to the capital available through the existing networks	Influx of new residents to run and work in tourism and tourists themselves can overwhelm and break down existing networks Differential involvement and competition in tourism can favour some groups over others leading to conflict
Linkage or bridging capital (external ties)	Tourism businesses can develop a range of external ties through tourist promotion and distribution systems that contribute to social capital	A focus on external ties necessary for tourism can be at the cost of maintaining internal bonds Emergence of external knowledge and power brokers who control these extended networks
Synergy or quality of state-society interactions – Involvement of citizens – Equality of treatment	Tourism planning processes can offer opportunities for resident participation in decisions Tourism can highlight the contribution of marginalised groups both through employment opportunities and through presenting culture to tourist	Tourism can be imposed by external agents against the wishes of residents creating conflict between citizens and state institutions Tourism can support existing elites contributing to increased inequality
Organisational integrity Competence, coherence and capacity of state institutions	Tourism development can improve capacity and competence of state institutions and bring together institutions that might otherwise not cooperate	Tourism business can undermine public institutions by leveraging access to tourists and resources into political power
Value introjection – Acceptance of group norms – Rituals/traditions	Tourism can be developed around existing values providing additional support for them Tourism can actively support rituals and traditions	Styles of tourism can clash with and undermine existing group values and norms Tourism development can change cultural practice and commodify rituals
Reciprocity exchange and trust	Tourism can offer various benefits for residents to offset costs such as improvements to infrastructure and leisure opportunities	Tourism can create burdens on infrastructure without reciprocal benefits for residents Tourism realities may not live up to promises made

Table 24.6 Key features of the sample of case studies

Region	Number of cases	Type of tourism	Number of cases
Europe	9	Nature based/ecotourism	8
Central/South America	4	Rural/agricultural tourism	7
Africa	3	Heritage tourism	3
Asia	2	Resort tourism	1
Australia	1	Indigenous tourism	1
USA	1		

Analysing the Selected Cases

Each of these cases provides a description and within case analysis of the process and outcomes of tourism development, and so each was content analysed for examples of the mechanisms listed previously, as well as for additional linkages between tourism and social capital. This was an iterative process in that if new linkages emerged, the list of possible linkages would be expanded and previous cases then re-examined in light of the revised list. This approach has been used to examine other aspects of tourism development and is described in more detail in those papers (Moscardo 2005, 2011).

The Case Study Outcomes

The information analysed for the cases came from publicly available reports, academic papers and conference presentations. Arguably such a selection process could be biased towards cases seen as successful either in terms of the tourism business or local responses to tourism because few communities are likely to feel comfortable with public declarations of failure. Given this bias, it is interesting to note that two of the cases reported on situations that were best described as total failures, three described a tourism development process that began positively but then stalled and eight reported a mixture of both positive and negative outcomes. The two outright failures were both cases where it seemed that the potential destination community had serious deficiencies in social capital in nearly all its forms as a result of their specific regional history. In each case, this existing lack of social capital meant that externally imposed tourist development projects failed to generate any local support and could not attract sufficient tourist interest to proceed. This is consistent with the claims of McGehee et al. (2010) and Macbeth et al. (2004) with regard to the critical nature of existing social capital for tourism development.

An investigation of the three cases, where initial local tourism initiatives were successful on a small scale but struggled to develop further, revealed that all were in more geographically remote locations within their own region and two were hampered by a lack of synergy and organisational integrity, whilst the third simply lacked resources. In each case, the initial success at tourism appeared to be built on a base of reasonable levels of existing micro-level social capital including both bonding and bridging capital, but a lack of competence and/or interest from the relevant government agencies stifled attempts to expand tourism sufficiently to achieve a level necessary for sustained economic returns. In these two cases, the community lacked the macro levels of social capital. The third case in this category did not lack social capital, but the networks at all levels lacked resources because of a long history of limited economic success. This third case and all three of these cases emphasise the importance of not assuming that social networks per se are all that is needed (Portes 1998; Woolcock 1998) or that social capital can overcome structural issues of lack of access, infrastructure and resources (Portes 1998; Stephens 2008).

The analysis of the remaining cases revealed the existence of five overall approaches to tourism development resulting from the combination of three types of context factors. The first context factor was whether or not the case was within a developed or an emerging or developing country, the second was whether or not the initial pressure for tourism development came from within or outside the case study community and the third was whether or not the external pressure was from an individual entrepreneur or larger tourism business. The five resulting approaches can be summarised as follows:

- Developing country, local tourism initiative
- Developing country, external business initiative

- Developed country, local tourism initiative
- Developed country, external business initiative
- Developed country, external entrepreneur

These approaches to tourism development were then associated with consistent patterns of linkages between tourism and social capital. Three such patterns were identified because the two approaches characterised by local initiatives were connected to the same pattern of tourism social capital linkages, as were the two approaches characterised by an external business initiative.

In both developed and developing country cases, local small-scale initiatives in tourism seemed to contribute to the same sorts of relationships between tourism and social capital. In each case, existing micro-level social capital supported the development of locally based associations and organisations which were responsible for a community-based or locally generated tourism initiative. As the tourism initiative grew and expanded, additional local cooperative groups were developed, and more and more intense social ties were created. Often the tourism venture attracted the attention of an external organisation or network through various tourism associations or government schemes for development support. Thus, in most of these cases, the successful operation of the tourism venture supported the development of both bonding and bridging capital which was then used for other social and economic activities. Where there was effective support from national and/or local government agencies, these tourism-focussed networks typically facilitated knowledge and skills transfers. Further, associations with broad representation from across the community and the regular meetings required for managing the tourism venture lead to increased trust, social cohesion and general cooperative spirit.

But within this generally positive pattern, a number of negative links between tourism and social capital were also noted. Equity of participation in the planning and management processes was an issue in some cases where the tourism was focussed on a particular indigenous group or dominated by powerful families. This situation contributed to conflict within and between social groups. Another problem was described with changing values resulting from moving from a communal agricultural system to paid tourism employment. In this case, tourism workers began to connect work with salary and were reluctant to engage in unpaid community efforts.

In general, the pattern associated with an external tourism business driving the initial tourism development was the same in both developed and developing locations, and overall this pattern was associated with fewer positive impacts on destination social capital although the extent of these impacts varied greatly. The underlying pattern involved the entry of an external business into the destination community through a large resort in the developed settings or smaller wilderness or eco-lodges in the developing settings. This external business typically entered into a partnership with local government agencies altering both the pattern of local social networks and the co-opting power within them, thus negatively impacting on micro-level social capital but also damaging the synergy between residents and their government organisations. In some cases, the external business did invest effort into supporting local networks and activities, and either the business or the government agency acted to ensure continuing resident involvement in decision making. In these cases, losses in some forms of bonding capital were associated with gains in bridging capital and access through the networks of the external business to knowledge and other resources. In turn this additional social capital supported local entrepreneurial activities built around the initial tourism venture. But if the external business continued to act in isolation, considerable conflict and mistrust ensued.

Finally, there were two patterns associated with entrepreneurs as the driving force for tourism development, one where the entrepreneurs were local residents and one where the entrepreneurs were migrants. In both these patterns, existing social capital was critical, and both bonding capital was needed as well as existing bridging capital, along with high levels of trust and openness to innovation. Where the entrepreneur was a local resident, successful tourism ventures depended

on both the local culture and the extent to which the entrepreneur could convert their existing social networks into business partnerships. Where the entrepreneur was a migrant or newcomer generally positive outcomes were described as these individuals brought with them additional networks and resources and were able to contribute in a number of ways to local social capital.

Finally, the existence of conflict was not always associated with an erosion of social capital. In several cases, conflict was tackled by developing further associations or committees to deal with it, and where there was extensive overlap in local networks, it seemed that these organisations were effective at resolving conflict. In other words, sometimes conflicts provided an opportunity to exercise social capital and enhance cohesion. Thus, the presence of conflict alone should not be automatically seen as a threat to social capital.

Conclusion

Using the results of the case study analysis and reviews of both literature on social capital in general and on tourism and social capital more specifically, it is now possible to five main ways in which destination residents can use tourism to build social capital.

- The nature of tourism as a multifaceted service experience means that it is best managed as a business activity through cooperative activities supported by associations and coordination bodies. These organisations and networks offer opportunities for residents to build social ties and develop bonding capital.
- The fact that tourists move through space means that tourism businesses must communicate across geographic boundaries and use wide-ranging external networks. Destination residents can use these external networks to build and develop bridging capital.
- Both these types of networks can be sources of knowledge, support and financial resources and the ongoing maintenance and use of them builds trust and reciprocal exchange.
- The economic returns from successful tourism ventures can be used to enhance the capacity and competence of formal tourism organisations contributing to improved organisational integrity.
- The development of tourist attractions and activities around local heritage and cultures is an opportunity for destination residents to build cohesion and group bonds.

These are a first set of preliminary conclusions, and much more extensive research is needed in this area. The present discussion focussed on social interactions within destination communities, ignoring social interactions between residents and tourists directly. This is just one example of areas yet to be examined.

Overall the discussion supports the value of the social capital concept for analysing tourism development (McGehee et al. 2010) and exploring tourism impacts on destination communities (Moscardo 2009). It also reinforces the importance of more explicitly considering community capacity in tourism development (Macbeth et al. 2004). Social capital in a community appears to be an important prerequisite for effective tourism development. Under the right conditions, tourism development can also contribute to the further development of social capital. This is more likely to happen when assessing and building community capacity are better integrated into tourism planning processes.

Finally, the cases analysed provided many examples of residents talking about the benefits of successful tourism development. These comments expressed pride in community achievements; highlighted increases in skills, competencies and self-esteem; and described improvements to safety, security and social interactions. In short the social capital derived from effective tourism developments was often seen as contributing in a significant way to improved Quality-of-Life for destination residents.

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Chapter 25

The Tourist Area Life Cycle (TALC) and Its Effect on the Quality-of-Life (QOL) of Destination Community

Muzaffer Uysal, Eunju Woo, and Manisha Singal

Introduction

Much of the tourism experience occurs in physical settings as a result of the interaction between demand and supply factors which change over time. Individuals travel to destinations to visit attractions, to participate in leisure activities, and to form vacation experiences resulting from their interactions with the places they visit. While the enjoyment derived from the tourist experience may vary depending upon the amount and quality of time spent at a destination, the quality of the service encounter, and personal and situational factors, the general objective of the travel is to improve the quality-of-life of the tourist. Similarly destinations, where the vacation experience is sought, undergo different cycles of development over time, affecting the nature of their appeal. The very existence of tourism and the sustained competitiveness of tourism areas depends on the availability of resources and the degree to which these resources are managed, developed, and enhanced in a sustainable manner to meet visitor expectations and residents' needs at the destination (Uysal et al. 2011). The extent of this interaction between the visitor and the visited also affects the nature of actual and perceived tangible and intangible benefits of tourism.

The entry of tourists into a destination changes its character forever. Places as destinations experience different phases or cycles of development, and examining each cycle of development and the speed of development reveals clues about managerial actions for destination planners and marketing organizations. The consequences of each cycle affect the quality-of-life in the destination in terms of both tangible and intangible benefits that result from tourism activities. Structural changes to the destination area over time invoke behavioral responses from both tourists and residents. The purpose of this chapter is to review the connection between tourism area life cycle (TALC) and its effects on the quality-of-life (QOL) of the destination community. The underlining assumption of this chapter is that as destinations undergo structural change over time, the dynamics of change affect the QOL of community stakeholders. Our focus is on the destination community and not the tourist experience per se. The chapter is divided into four major sections. The first section presents the concept of TALC and describes the indicators of each stage of the

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life cycle. The second section provides a brief discussion of the impacts of tourism on the destination in relation to TALC, followed by a third section which focuses on the adjustment of the community to the changes occurring at the destination while trying to maintain and enhance their QOL. Section four provides a review of related literature to support the relation between TALC and QOL of destination communities. The chapter ends with delineating critical topics for future research, outlining some of the difficulties in moving forward, and formulating relevant policy implications that may help researchers and destination management organizations to further examine the issues that may surround TALC and QOL connections.

Concept of Tourism Area Life Cycle (TALC)

The concept of tourism area life cycle (TALC) implies that places as destinations, like products, follow a relatively consistent process of development and a recognizable cycle of evolution (Butler 1980, 2004; Crompton et al. 1987; Meyer-Arendt 1985). The concept in its abstract form embodies the assumption that sooner or later a threshold is reached after which a tourist destination is perceived to decline in desirability. The concept of a tourism area life cycle suggests that as a destination area evolves, changes occur in the physical environment and the sociocultural environment that result in changes in the attitudes of the host community. TALC was developed based on the concept of the product life cycle (PLC). The product life cycle (PLC) framework has been used in the business sector to model the scale curve for a product over time (Levitt 1965; Vernon 1966). In general, the product life cycle describes the evolution of a product as it passes through the stages of introduction, growth, maturity, and decline, with the growth of product sales following an S-shaped pattern. In the first stage known as the introductory stage, sales growth is slow because of the lack of product awareness and high prices due to low scale production resulting in initial losses. In the second stage, known as the growth stage, sales rise rapidly as the product gains recognition and wide acceptance while prices fall due to large-scale production, leading to profits. In the third stage known as the maturity stage, sales gradually slow down, limiting profit potential. Finally, in the last stage known as the decline stage, the product becomes outdated, experiences a significant drop in sales, and is accompanied by negative profits.

Based on the product life cycle (PLC) framework, since the early 1960s, tourism scholars conceived that tourism destinations evolve and go through a life cycle process (Martin and Uysal 1990; Tooman 1997). Christaller (1963) first observed that sites of tourism locations follow a relatively consistent process of evolution. This is the most simplistic approach from discovery to growth to decline. In this representation, artists search out untouched unusual places to paint. This can lead to the development of an artist colony which in turn attracts other painters, the cinema people, and gourmets. This progression results in the destination being identified as fashionable and attracts commercialization. As the popularity of the destination increases, more working-class people are attracted, and advertising and travel agencies promote the destination. However, the original tourists leave the destination to find new untouched locations, and the cycle repeats itself.

Since Christaller's study, much has been studied with slightly varying approaches. Plog (1974, 2001) asserted that the rise and fall of a destination is due to the psychology of the travelers. He identified three main types of tourists: the allocentric, the midcentric, and the psychocentric, corresponding to different types (phases) of destinations. Implicit in this approach is that types of personality correspond to types of destinations and their development phase over time. Allocentrics are the first to visit a location because they are the most adventuresome. As numbers of visitations increase overtime, tourism facilities emerge and expand so that midcentrics become attracted. This increased popularity results in the maturation of the destination. At this point, the

destination may have achieved its maximum potential and attracted the broadest possible number of participants. However, the original tourists depart in search of new discoveries, and psychocentrics visit the destination. As this process completes itself, the psychocentrics eventually become the majority tourists and the place faces decline. With this decline, the question arises as to how the place now affects the well-being of different stakeholders that may represent both demand and supply sides of tourism and recreation activities. The response to each phase of development may require different policy and management actions. Residents of the destination may also have different responses to each phase of development depending on the extent to which residents may be affected by tourism activities. An earlier application of the product life cycle model to municipal recreation and park departments indicated that the evolutionary development of a recreation department or of particular components would have a determining effect upon selecting the appropriate managerial responses required for maximum effectiveness (Crompton and Hensarling 1978). Therefore, Crompton and Hensarling (1978) suggested that the managerial responses for each of the four life cycle stages should optimize the delivery of services appropriate for a recreation and parks organization. In the introduction stage, the department is a reflection of the individual in charge. The major goal at this stage is to develop sufficient public and political support to ensure survival. The dominant characteristic of the take-off stage is accelerated development. This stage requires a manager with planning and organizing skills and with the ability to attract high-quality personnel. The maturity stage is characterized by a move toward stability in organizational structure. The saturation stage is likely to stagnate and head for decline unless alternative action is taken. The decline stage may occur because of drastic changes in consumer demand or changes in the general economic environment. The authors concluded that managerial methods and skills should evolve as the department progresses through various stages of development. The corresponding method and skill changes certainly would necessarily have to take into account the types of amenities, service equity, and quality that will be provided.

Butler (1980) extended the PLC concept and formally introduced the concept of tourism area life cycle (TALC) in tourism settings. The TALC model discusses the development of a destination in terms of a series of life stages defined by the number of visitors and the level of infrastructure as indicators of development. Specifically, this model consisted of six stages: beginning with the exploration stage of the tourism area and followed by the involvement, development, consolidation, stagnation, and post-stagnation stages. The last stage is further characterized by a period of decline, rejuvenation, or stabilization. Butler (1980) reported that tourist areas go through a recognizable cycle of evolution and illustrated the different stages of popularity using an S-shaped curve.

Subsequently, Haywood (1986) attempted to operationalize Butler's TALC concept. He examined destination life cycle stages based on the percentage of tourist arrivals and annual growth rates as indicators of TALC. The author described four stages: introductory stage, growth stage, maturity stage, and decline stage. In the introductory stage, the annual number of tourist arrivals is less than 5% of the peak year. If the annual growth rate is more than half its standard deviation for the entire period, this stage is known as the growth stage. When the growth rate is between minus half and plus half the standard deviation, the maturity stage emerges. The decline stage sets in when the growth rate falls below minus half of the standard deviation. On the other hand, Toh et al. (2001) proposed an alternative and improved method of identifying tourism destination stages based on TALC. This approach, called travel balance approach (TBA), is premised on the notion that the economic development of the country in general, and tourism development in particular, will demarcate four stages of a country's travel balance, defined as net travel exports (exports over imports), as the driving indicator of change. In the introductory stage, the primitive destination country earns a limited amount of receipts from adventurous tourists from developed countries. In the growth stage, a few residents from developing countries start to travel abroad, but the rate of growth of travel exports far exceeds that of travel imports, resulting in a positive and

growing travel balance. The maturity stage then sets in, when travel exports almost peak, but the rate of growth slows down. In the decline stage, the country's focus shifts to high-tech and value-added industries and services with less emphasis on tourism development.

A general review of the extant literature reveals that the tourism destination life cycle concept has been studied with varying approaches. However, there is a great deal of similarity in the outcomes, and a general theme emerges. Among various approaches, Butler's (1980, 2004) model has attracted the most attention and discussion (Tooman 1997), and most of the reported studies have supported the belief that Butler's model provides a useful framework for description and interpretation (Richardson 1986; Johnson and Snepenger 1993; Oppermann 1998; Formica and Uysal 1996; Hovinen 2002; Boyd 2006; Zhong et al., 2008; Whitfield 2009; Singal and Uysal 2009). Thus, the following section provides a brief discussion on Butler's TALC model with its relevant stages.

Exploration

The exploration stage begins when a small number of visitors who are adventurous and attracted by the destination's unique or considerably different natural and cultural features arrive. In this phase of development, there is low access to the destination and rudimentary facilities for the visitors. Therefore, visitors use whatever local facilities as may be available and are likely to have high contact with local residents. At this stage, physical and social characteristics of the place are unchanged by tourism, and the arrival and departure of tourists would be of relatively little significance to the economic and social well-being of the permanent residents. The assumed benefits of tourism may accrue to a small number of providers, and the total economic benefits from travel and tourism-generated sales and taxes may be insignificant, which may in turn limit the amount of public spending that could be allocated for further enhancement of the tourist destination. Nevertheless, the tourist place provides a valuable experience to its visitors, fulfilling their needs and expectations.

Involvement

As the number of tourists increases, more of the local residents get involved to provide facilities for the tourists, thus resulting in additional income for the providers. While there is still limited interaction between tourists and local residents, the developing tourism industry leads to the provision of basic services, which also benefits the local residents. At this stage, some advertising to attract tourists can be anticipated, thereby inducing a definable pattern of seasonal variation. The basic initial market area for visitors can now be defined. Some level of organization in tourist travel arrangements can be expected, and the first pressures are put upon governments and public agencies to provide or improve transport and other facilities for visitors and locals alike.

Development

This stage is characterized as one where large numbers of visitors arrive. The number of tourists will probably equal to or exceed the permanent local population. Local involvement and control of development begins to decline rapidly while external companies provide up-to-date facilities.

This may be the most important phase of development in improving the quality-of-life for residents and the economic well-being of employees and providers of tourism goods and services. Natural and cultural attractions will be developed, maintained, and marketed while some of the original natural attractions will be supplemented by man-made imported facilities. Such enhancement projects are also available for the local residents to enjoy and enhance their life. On the other hand, changes in the physical appearance of the area will be noticeable, and not all of the changes will be welcomed by the local population. Local residents may start developing a negative attitude because the presence of a large number of visitors may impinge on the quality of their life (Doxey 1976). Moreover, the destination may also suffer from a change in quality of services provided through problems of over-used facilities, crowding, and increased pressure on existing services.

Consolidation

During the consolidation stage, tourism has become a major part of the local economy. However, the rate of increase of visitors has declined although the total numbers continue to increase, such that the total visitor numbers exceed the number of permanent residents. Deterioration of the quality-of-life and the negative impacts of tourism activities may be felt by the residents. Local residents may have stronger negative attitudes than at other stages, ranging from almost annoyance and resentment to antagonism (Doxey 1976; Dogan 1989). The perceived impacts of tourism may not be favorable. In some instances, marketing and advertising efforts will be widened in order to attract more distant visitors. The large number of visitors and the facilities provided for them can be expected to arouse some opposition and discontent among permanent residents particularly those not involved in the tourist industry.

Stagnation

At this stage, the peak number of visitors will have been reached, and most are repeat visitors. Capacity levels for many attractions and facilities will have been reached or exceeded, resulting in environmental, social, and economic problems (Butler 1980, 2004). The area will have a well-established image, but it will no longer be in fashion. Natural and genuine cultural attractions will probably have been superseded by imported “artificial” facilities. These negative changes will affect the quality of services and experiences provided to the visitors and diminish the value of tourism on the part of providers and other stakeholders involved in the production and management of tourism activities.

Decline

In this final stage, the destination will not be able to compete with newer attractions and will face a declining market. The place will no longer appeal to vacationers. Property turnover will be high, and tourist facilities and accommodation begin to be converted to non-tourist-related structures (Butler 1980). Several tourists’ facilities disappear as the area becomes less attractive to tourists, and the viability of the remaining tourist facilities becomes questionable. Ultimately, the area may become a veritable tourist “slum” or lose its tourist function completely. The quality-of-life in the destination community suffers considerably in the decline stage.

Rejuvenation

The rejuvenation stage corresponds to the renovation phase or the reintroduction of the product with new features phase in the product life cycle. This stage is usually not reached without the active involvement of destination planners and marketing organizations coupled with a complete change in the attractions and facilities on which tourism is based. Often, additions of man-made attractions are necessary. However, if neighboring and competing areas follow suit, the effectiveness of the measures will be reduced (Butler 1980). An alternative approach is to develop natural resources untapped previously. Rejuvenation requires a concerted effort on the part of those involved in the tourism production system.

Over the years, a number of studies have used the TALC model to examine destinations and their development over time. Most of these studies are descriptive and case-based, tracing the trajectory of a destination and the number of visitors attracted as it underwent structural changes during different phases of the life cycle. Table 25.1 provides a list of such studies describing the places examined, the types of indicators used for diagnosis of the phases, and results and implications outlined in the study with respect to QOL.

Impacts of Tourism Development and QOL

The discussion so far points to the fact that community consequences emerging from tourism development embody three major impact categories, namely environmental, social, and economic. The nature and level of complexity of these impact states will change over time as the destination moves from one phase to another on the continuum of destination development. The following section provides a brief discussion on each state of tourism impact dimensions.

Economic Impacts

To the destination community, the most prominent benefits of tourism development are economic benefits. These include higher tax revenues, increased job opportunities, additional incomes, increased public spending, and in some instances, foreign exchange earnings, and an increased tax base for local governments based on increased incomes. These indicators are usually labeled process indicators of quality-of-life and are the tourism-related factors and conditions that affect the resident community. In addition, there are some other macro indicators, called outcome indicators, which are also directly related to community residents' QOL. The major categories of community residents' QOL outcome indicators may include changes in wages, household incomes, degree of unemployment, number of unskilled workers, level of literacy rates, consumer cost of living indices, prices of goods and services, cost of land and housing, property taxes, number of retail stores, and the like. Both process and outcome indicators of tourism economic impacts are measurable, and to a large extent considered objective measures of QOL (Sirgy et al. 1995).

These benefits individually or collectively contribute to the economic and material well-being of the destination community. Many previous studies not only have examined the positive economic impacts of tourism development on host communities but also investigated negative economic impacts. Liu and Var (1986) examined both positive and negative economic impacts in terms of residents' perception of increased employment, investments, and

Table 25.1 The application of TALC model to different destinations

Author and date	Purpose	Region and characteristics	Indicators used	Notes on results
Hovinen (1982)	To suggest a five-stage evolutionary sequence appropriate to Lancaster County	Lancaster County, PA, USA Pleasure tourism destination	Number of visitors and physical and psychological carrying capacity	Lancaster County is undergoing an evolution of tourist development that involves different identifiable stages
Meyer-Arendt (1985)	To see the historical evolution of the resort within the framework of TALC	Grand Island, Louisiana, USA Resort town on the Louisiana Gulf Coast	Building capacity, maps at five different stages, visitor days, and capacity indicators	The evolution of Grand Isle can be described by the TALC
Keller (1987)	To address in general the issue of a peripheral underdeveloped region's industrial diversification strategy into tourism and to evaluate this strategy	Canada's Northwest Territories Geographically peripheral and disadvantaged region	Tourism producers (entrepreneurs), tourists (types of tourists), and authorities and agencies indicators (governments, trade associations, etc.)	For future development, manpower and expertise specialized in the tourism and hospitality industries are necessary
Strapp (1988)	To examine the TALC concept in order to determine its applicability to second homes	Sauble Beach, Ontario, Canada Cottage resort community	Number of visitors	The most appropriate way to portray this process is not to use the number of tourists but the average length of stays
Copper and Jackson (1989)	To see the utility of the TALC	Isle of Man, UK Offshore holiday island	Total numbers arriving and departing, institutional attitudes toward tourism, and infrastructure (accommodation, entertainment facilities, etc.)	The TALC provides a useful descriptive tool for analyzing the development of destination and is dependent upon management decisions and the setting of the destination
Debbage (1990)	To analyze how industrial organization and oligopoly can influence the resort cycle	Paradise Island, Bahamas	Types of visitors, number of visitors, capacity levels, and changes in industrial organization (international airline, hotel, and other sectors)	The TALC model does not emphasize the role of industrial organization
Ioannides (1992)	To identify the role of the agents and elements behind the rapid growth and structural change in tourism	The Cypriot resort cycle Small island nation	Visitor numbers, number of beds, types of accommodation, tourism receipts, tourist type, and arrivals	The state is an active player in tourism development, as well as foreign interest groups and transnational companies

(continued)

Table 25.1 (continued)

Author and date	Purpose	Region and characteristics	Indicators used	Notes on results
Getz (1992)	To examine the potential relevance of the TALC in tourism planning	Niagara Falls	Existing documents, interviews, field and map observations, and a questionnaire survey	Niagara Falls is in maturity stage. Planners need to focus on monitoring and forecasting
Harrison (1995)	To identify the development of tourism in Swaziland with TALC	Swaziland, Southern Africa	Structured questionnaires, basic data on the country's tourism industry, unstructured interviews, newspaper, and extensive library research	Tourism development in Swaziland does not follow Butler's ideal type as it consisted of exploration, inactivity, transaction, truncated development, and declined and attempted rejuvenation
O'Hare and Barrett (1997)	To seek the main trends in the total numbers of international tourists	Peru, South America	Total number of international tourists	The TALC is a useful conceptual framework for describing past trends in the evolution of the tourist industry
Agarwal (1997)	To test the applicability of TALC	Torbay region, South coast of Britain	Total number of tourists	Unit of analysis is important and also it is difficult to operate the TALC model
Douglas (1997)	To see the historical development of tourism in three island nations	Well-established seaside resorts Melanesia (Papua New Guinea, Solomon Islands, and Vanuatu) Colonial and postcolonial societies	Historical method and data (type of tourist, number of tourists, and infrastructure such as transportation and accommodations)	Even though the TALC is a useful tool, there are weaknesses in its application to colonial and postcolonial societies
Tooman (1997)	To apply the TALC in a case study in order to evaluate social welfare changes as tourism development evolves over time	Three regions in the Smokey Mountains, USA	Qualitative and quantitative indicators (personal incomes, unemployment, poverty levels, education attainment, contemporary observation, and contemporary observers)	The TALC explains evolution of second and third economic impact. In order to benefit from tourism development, policies need to be instrumented to control growth and emphasize economic diversity
Knowles and Curtis (1999)	To re-explore the relatively unexamined post-stagnation stage of the life cycle for the second generation of mass tourist resorts	European seaside resorts Mass tourism resort destination	Number of tourists	The TALC is appropriate to explain the post-stagnation stages

Hovinen (2002)	To examine validity of the TALC with consideration of chaos and complexity theory	Lancaster County, PA	Tourist arrivals and gross sales for individual businesses	The TALC is a useful framework for description and interpretation in this case study and is more useful by recognizing a "maturity" stage
Boyd (2006)	To illustrate the application of the TALC in a national park	Banff National Park, Western Canada	Number of visitors	The TALC has applicability as a useful guide to trace park development
Zhong et al. (2008)	To examine applicability of the TALC to national park	China's Zhangjiajie National Forest Park	Visitors and residents' perception of tourism development, secondary data source (peer-reviewed journals, books, news articles, etc.)	The park experienced exploration, involvement, and development stage. Now it is at the consideration stage
Singal and Uysal (2009)	To examine how destination management development and rejuvenation strategy affect destination by combining TALC and economic cycle	Abingdon in VA, USA Historical tourist town	Visitors log, sales tax, and other receipts	For a sustainable growth, there is need for balance between demand of a tourism enterprise and destination offerings on the supply side of tourism
Whitfield (2009)	To apply the TALC to the UK conference sector's life cycle	UK conference sector	Number of venues opening and offering conference facilities	Theoretical extension of the TALC is applied to the four conference venue classifications
Diedrich and Garcia-Buades (2009)	To explore the role of residents' perception of tourism impacts as an indicator of destination decline	Five coastal communities, Belize	Resident perception	Residents' perception of tourism impacts is an indicator of destination decline

Note: This table includes studies that provide both specific indicators and development levels of TALC. Thus, it is not intended to be exhaustive in its coverage

profitable local business. As part of the economic indicators of tourism, they mentioned the existence of negative effects such as an increase in the cost of living. Haralambopoulos and Pizam (1996) also found that while tourism increases tax revenue, personal income, standard of living, and attitude toward work, it also results in an increase in the prices of goods and services. Other residents' perspectives of tourism development have generally reported positive attitudes such as improved economic quality-of-life (Tye et al. 2002; McCool and Martin 1994; Perdue et al. 1990).

Sociocultural Impacts

Tourism development affects the sociocultural characteristics of residents such as habits, daily routines, beliefs, and values (Dogan 1989). Sociocultural impacts also have both positive and negative sides. Brunt and Courtney (1999) mentioned that tourism can result in improved community services; additional park, recreation, and cultural facilities; and encouragement of cultural activities. Such improvements, as a result of tourism, may also improve the well-being of destination residents. Liu and Var (1986) also provided that tourism increases entertainment, historical, and cultural exhibits, that is, tourism development plays a role toward increased cultural exchange, events, and identity. These improvements contribute to the emotional well-being of both residents and participants. However, from the negative perspective of sociocultural impacts, a significant number of studies have identified concern with crime, degradation of morality, gambling, and crowding of public facilities and resources (Brunt and Courtney 1999; Mok et al. 1991; Ap 1992; Pizam and Pokela 1985). Such negative impacts undermine the perceived quality-of-life in the destination community.

Environmental Impacts

Tourism development causes significant environmental damage. Often, the destination is developed to meet tourists' needs and wants without considering environmental damage (Andereck et al. 2005). Andereck (1995) identified the potential environmental consequences of development: air pollution, such as emissions from vehicles and airplanes; water pollution such as waste water discharge; wildlife destruction as a result of hunting; plant destruction; and deforestation. Environmental impacts have two perspectives: positive and negative. Liu and Var (1986) stated that half of the residents in their study perceived that tourism provided more parks and recreation areas and also improved public facilities. However, these residents did not perceive ecological decline as a result of tourism in their community. Perdue et al. (1990) also found a positive aspect of environmental impact. They mentioned that tourism development improves community appearance and results in greater recreation and park opportunities than before. Even though many studies have investigated the positive impacts of tourism on the environment, a majority of the studies have focused on the negative environmental impacts of tourism development. For instance, Brunet and Courtney (Brunt and Courtney 1999) studied residents concern with traffic and pedestrian congestion, and Johnson et al. (1994) examined overcrowding at outdoor recreation facilities.

Most of the indicators that fall under the social and environmental impacts of tourism are outcome indicators that are directly related to community residents' QOL. As seen from this

brief discussion, these outcome indicators may cover a wide variety of QOL indicators. The categories of community residents' QOL outcome indicators are:

- Social (educational attainment, crime rate, quality of the public transportation system, number of recreational parks and programs, housing quality, teen pregnancies, quality of local services such as police and fire protection, utilities, and roads)
- Health (e.g., infant mortality rates; reported incidents of certain diseases such as tuberculosis, polio, and venereal disease; infectious and serum hepatitis; life expectancy; number of health-care facilities in the community)
- Environmental well-being (land pollution, air pollution, water pollution, crowd intensity, traffic congestion, and the like)

Given the mixed findings of the impacts of tourism, one is challenged to find a way to minimize the negative impacts of tourism while maintaining a desired level of quality-of-life and maximizing the positive impacts of tourism through sustaining resources that provide quality experience and services for both tourists and locals. An interesting study, conducted by Andereck and Jurowski (2006), attempted to develop an index called Tourism and Quality-of-Life Index (TQOL) that demonstrated a method for examining and understanding how tourism activities (experiences) affect the quality-of-life of residents of a destination. The TQOL index consists of three complementary measures: (1) residents' assessments of the importance of quality-of-life indicators, (2) residents' assessments of their satisfaction with indicators, and (3) residents' assessments of tourism's influence on the indicators. By using a scale of 38 items, they covered economic, sociocultural, and environmental aspects of resident quality-of-life. Using a combination of methods, they were able to demonstrate that the higher the TQOL index, the more residents feel that tourism contributes to this particular indicator, even if the indicator is negative, such as crowding and congestion (p. 145). In other words, if residents feel tourism improves positive aspects of community QOL, then the TQOL index is a positive number. On the other hand, if residents feel tourism exacerbates negative QOL indicators such as crowding or congestion, then the index is negative. (For further information on the specific method followed to develop the index, see: Brown et al. 1998; Massam 2002; Andereck and Jurowski 2006.) This particular index is very useful in understanding not only the effects of tourism activities but also the perceived importance of those impact indicators and the level of satisfaction with the indicators. The second challenge centers around measuring and monitoring different types of QOL indicators over time. The operational definitions and relative importance of such indicators as key driving forces of change have to depend on the phase of tourism development in the destination community. On the other hand, the perceived impacts of tourism, negative or positive, are considered mostly subjective QOL indicators. The concept of subjective QOL indicators posits that community residents' perception of their overall QOL is a function of their satisfaction in their major life domains, namely economic, consumer, social, environmental, and health life domains.

Adjustment to Change and Maintaining QOL

It is clear from the preceding discussions that the structure of a destination can change under the influence of tourism activities. Tourism provides both positive and negative impacts on destinations, and the reactions of residents can range from complete resistance to acceptance. This continuum of reactions and adjustments depends upon the specific tourism implications on a host destination along with the number and type of tourists, importance of tourism to the destination,

and the sociocultural structures salient to the destination. Different communities react and adjust in different ways to the structural changes and their influences over time. Strategies and responses that communities adopt vary depending on the phase of tourism development. There are several strategies or responses that communities can take when dealing with the impact of tourism in their community. Responses and negative and positive attitudes to change may be expressed by residents at any time regardless of the phase of tourism development (Gartner 1996; Ap and Crompton 1993; Carmichael 2006), or in some instances, these responses may follow a linear behavioral reaction from very positive (euphoric) to very negative (antagonism) as articulated by Doxey (1976). In the beginning phase of tourism development, expectations about the potential of tourism to improve quality of residents' life are high, and local residents may express euphoric feelings toward visitors. In the subsequent phases, depending upon the manner in which development phases are managed and monitored, local residents may develop resentment and even antagonism which in turn may impinge further on their quality-of-life. Dogan (1989) provides a comprehensive response model and strategy for residents to deal with changes in their community. The main adjustment strategies (not necessarily mutually exclusive) are resistance, retreatism, boundary maintenance, revitalization, and adoption.

Resistance includes an overall envy and resentment of tourists and their lifestyles. This reaction is found among the upper class as well as the less-fortunate citizens and often leads to aggressive behavior toward tourists and the venues that support and cater to them. There are several circumstances that increase the likelihood of resistance as an adjustment tactic, such as "the existence of a large number of tourists and the fact that the inhabitants have to share facilities with them; the apparent material superiority of the tourists which may lead to feelings of envy and resentment among the inhabitants; and an increase in the number of facilities managed by the foreigners where the inhabitants are not usually allowed and where the foreigners work in higher positions and receive superior salaries compared to the inhabitants" (Dogan 1989, p. 222). Residents see tourism negatively and believe it is weakening the traditional institutions of the destination and destroying local identity and culture.

Another adjustment tactic is retreatism in which hosts attempt to avoid tourists and close off into themselves. This strategy is often used in situations where tourism has become too economically important to the destination to push away. Residents who use retreatism withdraw from society as a whole and find refuge within their own culture or subculture. Retreatism involves "increasing cultural and ethnic consciousness instead of an active resistance toward tourism" (Dogan 1989, p. 223). In yet another strategy, the economic benefits of tourism are so great, hosts choose to "nullify" the negative impacts tourism may bring and instead "present local traditions to tourists in a different context so that the effects of the tourists on the local culture are minimized" (Dogan 1989, p. 224). This strategy is known as boundary maintenance and enables a location to benefit economically without hurting the local culture. The most common example of boundary maintenance are the Amish who maintain a distance between themselves and the tourists, yet gain the economic rewards that come from tourism and ultimately enable their community to flourish.

Revitalization is a unique adjustment strategy because rather than the destination attempting to protect the local culture from the negative impacts of tourism, tourism in itself aids the protection and preservation of the culture by promoting its benefits and overall existence. Without tourism, specific celebrations or ceremonies of the local community may be lost. Revitalization also benefits residents by increasing their awareness and appreciation of their own heritage, some of which could be lost or forgotten with the passage of time. Examples of revitalization may include the development of local arts and crafts like pottery, basketry, decoration, jewelry, and leather goods making, or celebrating festivals and events, or participating in folk dances.

The final major category of host adjustment to tourism is adoption. Some residents, especially the young and the educated population of the upcoming and emerging destinations, who perceive

tourism as having mainly positive impacts may choose this method of adjustment. Adoption includes the “demolishment of the traditional social structure and the adoption of the Western culture of the tourists” (Dogan 1989, p. 224).

It is unlikely that any of the five strategies explained above will be seen in their pure form; rather hosts usually take a hybrid approach by combining aspects of different strategies. In addition, any adjustment strategy used by a destination at a given time will possibly change as tourism develops and the different impacts become more pronounced, either positively or negatively.

Resident's Attitudes to Tourism Development Depending on Life Cycle

As indicated, a structural change to the destination place also invites behavioral responses from residents. Martin and Uysal (1990) pointed out that there is an inverse relationship between development of destination life cycle stage and resident responses. They mentioned that

While the initial stages of tourism are usually met with a great deal of enthusiasm on the part of local residents because of the perceived economic benefits, it is only natural that, as unpleasant changes take place in the physical environment and in the type of tourist being attracted, this feeling gradually becomes more and more negative (1990:330).

A number of studies have attempted to examine the assumed relationship between life satisfaction and level of tourism development. For example, Allen et al. (1988) investigated the relationship between resident's perceptions of community life satisfaction and the level of tourism development in 20 rural Colorado communities that varied with respect to the amount of tourism development. Their study showed that when the level of tourism development is low to moderate, residents' perceptions are positive. However, when tourism development increased, the perception of residents showed a change from a positive to a negative trend. Long et al. (1990), based on the same study, also reported that residents' attitudes toward additional tourism development initially increased in a positive way. However, the threshold for tourism development beyond a point led to attitudes becoming less favorable. They also found that this threshold was achieved when approximately 30% of the community's retail sales were derived from tourism. Along the same line of research, Allen et al. (1993) examined the rural resident's attitudes toward recreation and tourism development in ten rural Colorado towns. They incorporated two per capita ratios based on tourism retail sales and total retail sales and designed four different tourism development conditions: low tourism development and low economic activity, low tourism development and high economic activity, high tourism development and low economic activity, and high tourism development and high economic activity. The results revealed that residents' attitudes toward tourism development with both high economic and tourism development and low economic and tourism development were more positive than those residents of the low/high or high/low economic and tourism development. A recent study by Meng et al. (2010) also found a correlation between differing levels of tourism development and QOL indicators. The study conducted on China revealed that the residents of provinces with the highest level of tourism development lead a significantly “better life” than those who are in the regions on medium or low level of tourism development as measured with a select number of objective indicators of QOL.

Johnson et al. (1994) examined the resident's perception of tourism development in the rural area of Shoshone County, Idaho, USA. To examine the change of resident's perceptions, this study relied on a longitudinal research design for 6 years. This study used both secondary and primary data: 1986 bond levy vote, 1989 tax levy vote, and 1991 survey of local resident's perceptions. The survey asked residents about their expectations of the economic, social, and environmental impacts. The survey results revealed that a majority of the residents were negatively disposed toward the perceived overall expected economic, social, and environmental impacts

resulting from tourism development. Overall, the longitudinal assessment showed that perceptions of the residents changed from positive to negative over time. Specifically, in 1986, 94% of the participants supported tourism development; in 1989, 82% supported development, while by 1991, survey results showed that only 28% of the residents supported tourism development.

Akis et al. (1996) compared perceptions of Greek and Turkish Cyprus residents toward tourism development based on Butler's hypothesis. Their survey asked questions to local residents about the economic, social, and environmental impacts of tourism development in Paralimni, Ayia Napa, and Kyrenia. The results revealed that there is no statistically significant difference among the three places in residents' perceptions of economic impact. Most residents considered tourism development as having a positive impact. However, there was a statistical difference in the social and environmental perceptions between the regions; Kyrenia residents were more positive toward social and environmental impact than Paralimni and Ayia Napa residents. The results supported Butler's model that resident attitudes progress from positive to negative and vary depending on level of tourism development.

Ryan et al. (1998) compared attitudes of residents toward tourism development in rural areas in New Zealand and in the UK. The two regions were in different stages of the destination life cycle. The first region in the UK could be described as a mature stage destination. The second region in New Zealand was considered as being at the late involvement stage of the life cycle. The results revealed that New Zealand residents were more supportive of tourism than UK residents were toward tourism development.

Upchurch and Teivane (2000) examined Latvian resident's perception of tourism through a descriptive research design using a convenience sampling procedure. They asked residents of Riga about their perception of economic impact, social impact, and environmental impact factors. The results suggested that residents perceived that tourist arrivals had not increased local revenues, nor raised their standard of living, nor caused an increase in local employment. In the social impact perspective, the residents indicated that prostitution, theft, and burglary decreased in the community. While the residents thought that friendliness, honesty, and trust in people had increased with the development of tourism, so did pollution. Based on residents' attitudes toward tourism development, it could be inferred that tourism development was at the initial stages of development.

Diedrich and Garcia-Buades (2009) investigated the role of residents' perceptions of tourism destination development. Specifically, the researchers examined the interrelationship between local perceptions of impacts and the level of tourism development. This study collected data from five different coastal communities in Belize. Each community was considered to be at a different level of tourism development. They used participant observation, semi-structured interviews, key informants, secondary sources, and a household survey instrument. The results revealed that when tourism progresses through Butler's stages, residents' perceptions of benefits increased until the critical point was reached, after which they start to decline. That means that the perception of costs surpasses the perception of benefits when the level of development enters the critical stage. Kim et al. (2003) study reported that the relationship between tourism impacts and the satisfaction with particular life domains resulting from tourism vary at different tourism development stages. For example, the relationship between the economic impact of tourism and the satisfaction with material well-being, and the relationship between the social impact of tourism and the satisfaction with community well-being, initially decreased in the growth stage of tourism development and peaked in the maturity stage of tourism development. This finding is consistent with the tenets of social disruption theory. England and Albrecht's study (1984) postulates that boomtown communities initially enter into a period of generalized crisis, resulting from the stress of sudden, dramatic increases in demand for public services and the need for improving community infrastructure. Additionally, residents develop adaptive behaviors that reduce their individual exposure to stressful situations. Through this process, residents' QOL is

expected to initially decline, and then improve as the community and its residents adapt to the new situation (Krannich et al. 1989). However, when a community enters into the decline stage of tourism development, the above-mentioned relationships may be considered to be the full capacity of the destination area to absorb tourists before the host population would feel negative impacts. This is consistent with the theoretical foundation of carrying capacity. When tourism development reaches its maturity stage or its maximum limit, residents' QOL may start deteriorating. As such, the concept of sustainable tourism was developed when the maturity stage of the life cycle is reached.

Thus, based on previous research outlined above, there is an inverse relationship between the level of tourism development and residents' perception of economic, social, and environmental impacts.

Relationship Between TALC and QOL

The previous section illustrated that depending upon the level of the destination development, residents' attitudes toward economic, socio-culture, and environment may change from positive to negative or negative to positive. Destination development not only affects residents' attitudes but also their overall quality-of-life. According to Powers (1980, 1988), QOL represents the commodity bundle of attributes such as social characteristics, infrastructure, cost of living, income, recreational opportunities, and environmental amenities that characterize an area. Therefore, using these attributes, residents' perceptions of QOL can be examined. Several previous studies have been conducted to see the relationship between tourism development and resident's quality-of-life, their community satisfaction, and support for different types of development (Allen et al. 1988; Jurowski et al. 1997; Gursoy et al. 2002).

Perdue et al. (1999) compared the concepts of tourism development cycle and social disruption theories for assessing the impact of gaming tourism on resident quality-of-life. They developed four hypotheses for that purpose and surveyed adult residents in the five different communities: one nongaming community, three early stage gaming communities, and one late-stage gaming community. The results supported the social disruption theory that resident QOL is expected to initially decline and then improve with community and resident adaption to the new situation.

Bachleitner and Zins (1999) mentioned that a high degree of regional identification, with the space, history, and cultural heritage of the destination, improves the QOL of the residents. Their study investigated differences in tourism demand toward cultural benefits between urban, multifunctional, and rural regions for 2 years. This study used the extended Tourism Impact and Attitudes Scale (TIAS). The extended model included the domain of psychosocial impacts. This model was tested using survey methods conducted twice in 1994 and in 1995. The results revealed that during a large cultural event, support for economic development and improvement of infrastructure through the vehicle of tourism were higher than 1 year later. Perceived negative impacts of environmental and psychosocial dimensions had changed too. The environmental dimension of the residents' perceptions seemed far more sensitive to large-scale changes than small-scale changes.

Roehl (1999) stated that residents of casino areas perceive both benefits and costs from casinos, and that individual differences may be related to these perceptions. The author assumed that Nevada residents would perceive both the positive and the negative impacts of gambling. These perceptions varied across respondent characteristics, and the overall evaluation of the effect of gambling depended upon both specific perceived positive and negative impacts. The results of this study showed that Nevada residents recognized that gambling had brought both economic

benefits and social costs. Less than one and half of the respondents agreed that gambling had made their community a better place to live. The author suggested that if economic benefits to the community and personal benefits to residents are perceived to be high while social costs were perceived to be low, then QOL was perceived to be high. On the other hand, if respondents believed that casinos were associated with relatively more social costs and fewer benefits, then QOL was perceived to be low.

Previous studies on resident attitudes toward tourism development have supported the notion that support for tourism development varied among different population segments. Therefore, for development strategies to be sustainable, market planners and developers need to know how citizens view their quality-of-life and how they might react to proposed strategies. Jurowski and Brown (2001) mentioned that depending on citizens' community involvement, their perception of tourism-related QOL is different. Therefore, an understanding of the perceptions of citizens who are involved in community organizations is important. Results, obtained from using telephone interviews, revealed that residents who belonged to no community organizations evaluated the quality of most aspects of their lives lower than those that were the most involved, that is, they found a positive relationship between membership in community organizations and residents' satisfaction with their quality-of-life.

Andereck and Vogt (2000) examined the effect of residents' attitudes toward tourism on support for development. This relationship was tested for seven different communities (Globe-Miami, Williams, Hualapai Indian Reservation, Douglas, Peoria, Parker, and Holbrook). These seven communities represent rural, small urban, and Native American reservation destinations. The results show that communities have differing attitudes about community development, quality-of-life, and negative impacts. Most residents, regardless of which community was studied, tended to have a positive attitude toward community development. However, there were differences in opinions regarding the tourist's role in improving the quality-of-life of the residents; for example, Douglas and Holbrook communities had the most positive attitudes about quality-of-life, while Parker and Peoria communities were the most concerned with negative impacts.

Ko and Stewart (2002) investigated the relationship between residents' perceived negative and positive tourism impacts and their attitudes toward host community. Specifically, they examined the relationship between five main constructs: personal benefit from tourism development, perceived positive tourism impacts, perceived negative tourism impacts, overall community satisfaction, and attitudes for additional tourism development. They collected data from Cheju Island, Korea, which is the most popular tourism destination and also where tourism is the primary source of business activity. The results revealed that resident's community satisfaction is related to perceived positive tourism impact and perceived negative tourism impact. Specifically, there is a high positive relationship between community satisfaction and perceived positive tourism impact, and there is a negative relationship between community satisfaction and perceived negative tourism impact. Moreover, both positive and negative impacts also affect attitudes toward additional tourism development.

Using a similar approach, Vargas-Sánchez et al. (2009) examined the relationship between attitudes (negative or positive), satisfaction, and further development of tourism in Minas De Riotinto, a destination in the early stages of tourism development. The results of the study showed that there is a positive relationship between positive impact of tourism and satisfaction of residents with their community and a negative relationship between perception of negative impact and negative attitude toward tourism development. Moreover, the authors found that if satisfaction increased, negative attitude toward tourism development decreased.

Milman and Pizam (1988) examined Central Florida residents' attitudes toward tourism development. They found that residents had a positive attitude toward tourism in general. About 78% of the residents favored or strongly favored the presence of tourism. Most residents considered that tourism development improved employment opportunities, income and standard of

living, overall tax revenue, and quality-of-life in general. However, tourism increased negative impacts such as congested traffic conditions, and increase in individual and organized crime, and alcoholism.

As seen from the select studies described above, tourism can have an impact on the culture, environment, economy, and sociocultural aspect of a community. In general, an examination of studies on impacts indicates that the economic impacts are perceived as positive in most cases, whereas sociocultural and environmental impacts are frequently considered as negative or neutral (Tosun 2002; Harrill and Potts 2003). Many social scientists agree that in many instances, tourism has had a negative impact on culture through materialism, decline in traditions, increase in crime rates, crowding, social conflicts, environmental deterioration, and dependency on other industrial countries. Such impacts may also contribute negatively to community well-being, economic well-being, and health well-being domains of the destination place. All these negative impacts reduce the quality-of-life of residents and eventually the quality of the vacation experience. Developers, tourism promoters, and tourists as consumers of tourism products and services need to become more socially responsible and understand that they are affecting the quality of lives of many people.

Conclusion

Once a community becomes a tourist destination, the lives of residents in the community are affected by tourism, and the support of the entire population in the tourism community is essential for the development, planning, successful operation, and sustainability of tourism (Jurowski 1994). Therefore, the quality-of-life (QOL) of the residents in a community should be a major concern for community leaders.

A destination has myriad opportunities and challenges due to changing infrastructure, development of host attitudes, number of tourists, and severity of impacts, both positive and negative. In order to trace the evolution of a location, the product life cycle model is used to assist management in decision making and in addressing stakeholder interests. The most important reason for the development of the tourism life cycle is to realize that a destination is not static; it changes over time, and the planning process and marketing strategies must also adapt to enable the adjustment process.

Successful development of a destination's tourist activity incorporates the sociocultural concerns of all stakeholders from the inception of a project (Singal and Uysal 2009). Impact measures such as carrying capacity, limits of acceptable change, objective and subjective indicators, and the visitor impact monitoring process can be used in conjunction with the planning process to guide each stage of development of the tourism life cycle. Such an approach will help sustain tourism and contribute to the well-being of the stakeholders. For tourism to be a force in improving destination residents' quality-of-life, there has to be healthy economic growth and development that can meet both basic and growth needs. A high degree of ecological integrity that encourages sustainable development, by preserving and protecting cultural and natural resources, while making progress and creating social equality, is crucial in terms of empowering individuals in the process of planning tourism development and decision-making. Without the presence of the tenets of sustainability (economic vitality, ecological integrity, social equity), it is very difficult to improve the quality-of-life of those that are involved in creating and producing tourism goods and services (Pennington-Gray and Carmichael 2006; Flint and Danner 2001; Weaver 2006).

There are some guidelines that can be followed in order to ensure that tourism development is socially sensitive and sustainable. The tourism industry should be the subject of a promotional

campaign designed to educate the general public. At the local level, tourism planning should be based on the goals of the local residents. The promotional efforts of the local attractions should be subject to resident endorsement and cooperation with different stakeholders. The public and private sectors should work together to maintain the integrity and quality-of-life that the locals are familiar with. The traditions and lifestyles of the locals and the biodiversity of the destination place should be considered, and the boundaries of tourism development should be set so as not to exceed these limits (Bricker et al. 2006). Locals should be encouraged to use local capital, entrepreneurial opportunities, and labor to develop their own tourism opportunities. Broad-based community participation should be encouraged at tourist events and activities. Communities should adopt or refine themes and events that reflect the history, lifestyles, cultures, and traditions of the local area which foster the emotional well-being of the resident community. Attempts to mitigate general growth problems identified in a given community should precede the introduction of initiatives that increase existing levels of tourist activity. There is ample opportunity to further examine the connection between level of sustainable tourism development, its tenets, and quality-of-life of different stakeholders in tourism.

Community quality-of-life indicators should be developed and integrated into overall planning of tourism development and other public policy activities (Budruk and Phillips 2011). The link between objective indicators of tourism factors and QOL of destination residents needs to be strengthened with the subjective indicators of QOL as indicated by different stakeholders at the destination. There is also scope for further work in this area in relation to different phases of tourism development over time. The nature and relative importance of QOL indicators will certainly change over time. Data generated and monitored should reflect such changes. Without community quality-of-life indicators and their perceived importance in relation to satisfaction with the indicators (Sirgy et al. 2010), we would not have the necessary information to totally understand the true value of tourism activities in destination areas. We hope future research extends the results from current studies to provide more integrated information and intelligence for tourism planning and sustainable development.

A careful review of related studies of tourism impacts on development in relation to destination phases, and the relationship between destination development and residents' attitudes, show that, depending on the level of tourism development, tourists' attitudes toward economic, socio-culture, and environment change from negative to positive or positive to negative. However, this does mean that residents who have positive attitudes toward tourism development are satisfied with their quality-of-life. Tourism growth and its positive socioeconomic results do not necessarily yield a higher quality-of-life for the residents of the destination community (Jurowski et al. 2006). For instance, even though residents may face a lower quality-of-life, they may nevertheless be supportive of tourism development because of better economic prospects or job opportunities which are directly related to their livelihood and economic well-being. In other words, residents who are not supportive of tourism development can still be satisfied with their community quality-of-life. This brief argument hits at the notion of equity and distribution of tourism benefits. Tourism development in each phase of the TALC has to address the issues of whether or not tourism meets both the basic and growth needs of the residents for it to contribute to the quality of residents' life. Access to resources (for human needs or animal grazing), empowerment which enables individuals to make choices as they see fit, and creating opportunities for individuals and local businesses would be at the heart of discussion in each phase of tourism development. Generating such information at one point in time is useful; however, monitoring such issues over time in relation to phases of tourism development would be of immense value for policy makers and tourism developers. Thus, measuring the equity of exchange related to tourism activities in a destination is critical to the production of tourism experiences for both residents and tourists (Jurowski et al. 2006). It is clear that a lower level of quality-of-life of residents of a destination would not be able to sustain a better quality of tourism experiences in the long run. Further research is needed that focuses on

the reciprocity effects of quality-of-life of residents and quality vacation experiences and how this exchange and interaction may change over time, creating significant challenges and opportunities for researchers, planners, and policy makers.

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Chapter 26

Relationship Between Carrying Capacity of Small Island Tourism Destinations and Quality-of-Life

Deborah L. Kerstetter and Kelly S. Bricker

Introduction

In this chapter, we provide a review of the literature on carrying capacity and document its relevance to quality-of-life for residents of small island tourism destinations. In the first section of the chapter, we review the carrying capacity literature, with a particular emphasis on island settings. In the second section, quality-of-life research in general and as it pertains to residents of island destinations, especially those that are dependent on tourism, is discussed. In the third section, we introduce an example drawn from the Yasawa Islands in the Republic of Fiji. Our intent in including an example is to demonstrate the fragility of quality-of-life for residents of small island destinations, especially when dependent on economic and other associated benefits of tourism. In the fourth section we bring the chapter to a close by summarizing our thoughts and recognizing the importance of utilizing a sustainable tourism lens when addressing the carrying capacity of small island destinations.

Carrying Capacity: An Overview

Historically, carrying capacity has been defined in many ways, from the abstract to the specific – oftentimes leading to ineffective and limited use. Carrying capacity has most recently been defined as “...the number of individuals who can be supported in a given area within natural resource limits, and without degrading the natural, social, cultural and economic environment for present and future generations” (The Carrying Capacity Network 2009). This definition has evolved from a long history of carrying capacity research, which, for natural resource management, began in the 1960s.

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In the 1960s, carrying capacity research focused primarily on the impact of increasing numbers of visitors on natural resources. During this time, carrying capacity research in recreation and natural resource management fields generally addressed ecological capacity (e.g., how use level affects plants and animals); physical capacity (i.e., the amount of space in undeveloped natural areas); and facility capacity (e.g., the capacity of man-made structures) (Shelby and Heberlein 1984). However, Wagar (1964) recognized early on that researchers must consider human values. As more and more people visit an area, not only will the environment be affected, but so too will the quality of the visitor's experience. Thus, carrying capacity research evolved to include resource related capacity considerations (i.e., ecological, physical, facility), as well as social-psychological (i.e., perceived crowding) components.

By the 1970s and 1980s, much of the research focused on identifying factors that mediate the relationship between visitor numbers (i.e., use level) and social carrying capacity, particularly "perceived crowding." These factors included motivations, expectations, and preferences (Absher and Lee 1981; Ditton et al. 1983; Gramman 1982; Schreyer and Roggenbuck 1978; Shelby et al. 1988; Vaske et al. 1986; Whittaker and Shelby 1988); experience (Bryan 1977; Heberlein and Dunwiddie 1979; Munley and Smith 1976; Towler 1977; Vaske et al. 1980); attitudes toward wilderness (Schreyer and Roggenbuck 1978; Stankey 1973); density and use levels (Graefe et al. 1984; Hammitt et al. 1984; Heberlein and Vaske 1977; Manning 1985; Shelby and Heberlein 1986; Titre and Mills 1982); characteristics of people encountered (Devall and Harry 1981; Driver and Bassett 1975; Graefe et al. 1986; Knopp and Tyger 1973; Noe et al. 1981); and the influence of environmental quality (Bultena et al. 1981; Vaske et al. 1982). Unfortunately, consistent evidence as to the relative effect of these factors on the resource or individual experience proved difficult. Shelby (1980), for example, documented that social and psychological factors explained more of the variance in perceived crowding than use levels. Lucas (1985) found that despite an increase in the number of hikers in the Bob Marshall Wilderness, visitors did not report feeling any more crowded than they had 12 years earlier when use levels were much lower. Others, including Graefe et al. (1984) and Hammitt et al. (1984), found the opposite: use levels accounted for up to 43% of the variance in perceived crowding. In response, some researchers (e.g., Shelby and Heberlein 1986; Williams et al. 1991) began to focus on norms, assuming that "perceived crowding is an expression of individual judgment and socially shared norms about 'appropriate' density at a given site and at a given time" (Kuentzel and Heberlein 2003, p. 351). They also began to develop standards for the measurement of norms (Shelby et al. 1988; Vaske et al. 1986; Whittaker and Shelby 1988). This normative approach had a few deficiencies, however, as it: excluded past visitors who may have been displaced by new visitors, ignored the fact that new visitors tend to have poorly developed expectations; and was not sensitive to the fact that preferences and norms are socially constructed and may be a less useful evaluative measure in high density settings (Patterson and Hammitt 1990; Roggenbuck et al. 1991; Shelby and Vaske 1991). In addition, while empirical evidence affirmed that increasing visitor use may lead to different types of increased impacts, researchers began to question how much impact should be allowed (Kuentzel and Heberlein 2003) and proposed defining indicators and standards of quality. The monitoring and management frameworks that came out of their proposal included Limits of Acceptable Change (LAC: Stankey et al. 1985); Visitor Impact Management (VIM: Graefe et al. 1990); and Visitor Experience and Resource Protection (VERP: Manning 2001).

The complexity of issues associated with the study of carrying capacity continues today. According to Kyle et al. (2004), perceived crowding, which they define as "a psychological state arising from an individual's subjective evaluation of setting density for specific environments" (p. 210), is now believed to be a function of personal (i.e., trip motivations and past experience which informs expectations and preferences); environmental (e.g., season, location,

availability of resources); and social characteristics (i.e., characteristics of individuals encountered) (c.f., Shelby et al. 1989; Webb and Worchel 1993). Kuentzel and Heberlein (2003) feel that the way in which encounter norms are measured should be revisited: people consider on-site density cues and social representations of leisure activities to “define appropriate standards of use” (p. 366). Given the complexities that exist beyond the visitor experience, they also argue that the management and service structure of a destination be considered. In their study of the Apostle Islands, Kuentzel and Heberlein found that participation in recreation activities and encounter norms change along with modifications in management as well as the life cycle of the destination and/or its services.

While the basic premise of carrying capacity has remained constant (i.e., the need for limits or thresholds), tourism researchers have expanded traditional monitoring and management frameworks (Thomas et al. 2005) to include pressures affecting a “community” at large, such as: pressure on the natural and social-cultural environment, which in turn affects local resource utilization (e.g., freshwater, food supply, infrastructure), and the actual functioning of ecological and local communities (e.g., Coccossis et al. 2001). One example of an expanded framework is social impact assessment (SIA), which builds on the notion that social, economic, and biophysical impacts are interconnected. “The primary purpose of SIA is to bring about a more sustainable and equitable biophysical and human environment” (Rowan 2009, p. 185). In a tourism context, researchers adopting this framework would begin by collecting baseline data on social receptors (i.e., individuals, sociocultural groups, and community organizations or entities) and community resources (i.e., community assets, amenities, and opportunities) to identify who or what is being (may be) affected by tourism development. There is no doubt that this type of baseline data is necessary because tourism development occurs within complex systems of values, perceptions, stakeholder issues, and more (McDonald 2009). As more destinations experience increased tourism, we expect that carrying capacity research will continue to advance into many more aspects of a destination, including physical, economic, perceptual, social, ecological, and political capacity. Such research will also begin to account for positive and negative impacts on residents’ quality-of-life.

Carrying Capacity Issues in an Island Setting

Despite the fact that island environments are highly sensitive to excessive use (Kokkranikal et al. 2003), external influences, and economic and political pressures (Lockhart et al. 1993), few studies exist on carrying capacity in island settings. This could be because individuals do not recognize or may not be willing to accept that a capacity limit exists for islands. It could also be due to the difficulties of specifying and quantifying carrying capacity. In the early 1990s, Witt (1991) and Lockhart et al. (1993) attempted to quantify the impact of tourism by using a local population/tourist bed-capacity ratio. They argued that such a statistic would provide a measure of over- and under-development or capacity. During the same time period, the World Tourism Organization (1992) suggested that planning and capacity standards be developed using hotel density (i.e., 20–100 beds per hectare) or general tourist area density (i.e., 13–35 miles per person). Notably missing from these efforts were resource and social-psychological (i.e., perceived crowding) components of carrying capacity. The efforts of Coccossis and Parpairis (1992) and Trousdale (1998) are an exception.

Coccossis and Parpairis (1992) proposed a tourism capacity approach that included ecological (e.g., acceptable level of visual impact); economic (e.g., level of employment suited to the local community); social (e.g., the volume of tourism that can be absorbed in the social life of the area); cultural (e.g., the level of tourism that will maintain heritage); and resource availability

(e.g., water) standards. Coccossis and colleagues (2001) identified three place-specific factors that should be considered when assessing carrying capacity in a tourism setting:

- 1) the characteristics of the locality which provide the basic structure for the development of tourism; 2) the type of tourism, which determines basic characteristics of the condition of the local community and tourist behavior, local economy, and the tourist development/environmental quality relationships; and 3) the tourism/environment interface, which is a composite of each of the two previous factors, including the type of tourist development (spatial patterns), the stage of a destination within the life-cycle context, the organizational and technological capacity systems implemented, and how tourism is managed and organized. (Coccossis et al. 2001, p. 8)

Coccossis et al. also recommended accounting for small and medium lodging and accommodation facilities, which are often located in or nearby small communities.

As Coccossis and his colleagues argue, carrying capacity in a tourism context is more focused on “the relationship of tourism with the local society/culture, the effects on local production systems and the economy of the island, quality-of-life, but also the demands and impacts on resources such as water and energy, and the management of waste...” (p. 8). This approach to conceptualizing carrying capacity in a tourism setting is important for residents of island destinations who are concerned with visitor flows and the potential impact of tourism development on their rural society, culture, and environment.

Trousdale (1998) also adopted a more comprehensive approach to carrying capacity by utilizing environmental, social, and infrastructural parameters. Addressing the need for change on Boracay Island in the Philippines, he proposed using five major parameters with multiple indicators to assess carrying capacity: physical (e.g., ground water quality, ground water quantity, marine water quality, land, sewage, and solid waste); tourist perceptions (e.g., crowding – white beach only, crowding – all beaches, general perceptions); residents’ general perceptions; transport (e.g., air access, boat transport from the mainland, road and road system, vehicles); and governance (e.g., local, regional, and other governmental units).

Resource Carrying Capacity in an Island Setting

In terms of resource-based carrying capacity research in an island setting, Kuentzel and Heberlein (2003) found that encounter norms of boaters in the Apostle Islands increased and then stabilized during a 22-year period. They hypothesized that this pattern was due to two factors. First, people use density cues; as use levels increase they tend to prefer what they see. Second, when institutional (e.g., National Park Service management) or structural (e.g., boat industry) conditions change, so too does recreation behavior and the social psychological evaluations (i.e., encounter norms) that follow. Recognizing that tourism managers may have different perceptions of carrying capacity, Sewell et al. (2005) interviewed 24 individuals in Guyana, Jamaica, Trinidad, and Tobago. In Guyana, Trinidad, and Tobago, managers felt that visitation levels were not high enough to warrant establishing carrying capacity criteria. In Jamaica, managers suggested that carrying capacity criteria existed, but were not adhered to. In a carrying capacity study of the island of Rhodes, located in the Aegean Sea, the United Nations Environment Programme (1993) addressed resource-based carrying capacity by tourist development zones rather than the island as a whole. The central and eastern coasts of the island are the hub of tourist development and such have different levels of carrying capacity than other areas/zones of the island.

Social Psychological Carrying Capacity in an Island Setting

Control and vulnerability are at the core of social psychological carrying capacity in many island settings. In the Shetland Islands off the coast of Scotland, local authorities had to gain confidence

in their ability to plan for and control tourism development and, “despite considerable pressure from external public and private sources[,]... safeguard what [they saw] as the Shetland way of life...” (Butler 1996, p. 27). In Zanzibar, which is comprised of two islands off the coast of Tanzania, local communities have had little say over what type of tourism development occurs and where (Sulaiman 1996). The central government makes the decisions. Thus, the result, which also has been seen in the Caribbean, is resentment.

Forced to choose between an industry [they] ‘deep down’ [do] not really want, and the economic fruits of that industry which [they need] and which, it seems, more and more only tourism will provide[,]... Caribbean people... act out, perhaps involuntarily, social attitudes hostile to the industry. (Holder 1990, p. 74)

Islands are considered vulnerable to tourism development because often they are dependent on small, niche markets; have limited access; are dependent on imported goods; and have limited financial resources (Lockhart 1997). For example, the Balearic Islands (i.e., Ibiza, Formentera, Mallorca, Minorca) are dependent on two primary groups of tourists – the British and the Germans (Bull 1997). Because tourists tend to visit primarily in the summer, up to 60% of the hotels are closed during the 6 months of low season, placing a strain on residents who are dependent upon tourism for their income. Vanuatu, a micro island nation in the South Pacific, represents a destination that suffers from less-developed transportation links and isolation from export markets (Milne 1997), again leading to dependency on external agents for the success of the tourism industry. Political instability (e.g., terrorism, civil wars, military coups, riots) also leads to vulnerability (Hall and O’Sullivan 1996). Cuba, Fiji, Haiti, and Jamaica are a few of the many examples of island nations dealing with political instability. They have had difficulty with realigned or reduced tourism flow, a tarnished image, and due to fluctuations in the economy, rampant crime, and civil discontent (Mather and Todd 1993; Sonmez 2002).

The Impact of Tourism Development on Island Destinations

Research on the impact of tourism development on tourism island destinations is also relevant. Various authors have highlighted the social, cultural, and environmental impacts associated with tourism development. Changes in the social landscape are evident in the Mediterranean where young men and women have challenged traditional patriarchal and matriarchal structures by leaving their villages in the interior of the island for jobs in tourism enclaves along the coast (Selwyn 2001). On the island of St. Lucia in the Caribbean, this migration has been unsuccessful as young men and women have been offered low paying service jobs, only, resulting in frustration and deep resentment. And, residents of Tonga have bought into the demonstration effect, wanting to look like and live the life of the “other” (Guthunz and van Krosigk 1996). This change in the social landscape has not only affected young residents and their families, but also the space in which they live their lives. For example, pristine spaces that were once available to members of the coastal community are now becoming privatized in response to tourism development. In the Aeolian Islands speculators built houses and hotels on large tracts of land without any consideration for aesthetic or environmental conditions (Giavelli 2001). The quality of their work was poor and, as a result, local residents living in these developed areas have had to deal with overtaxed sewer systems and inadequate facilities for rainwater collection. In Malta, the exponential growth in tourism has left residents with congested roadways, beaches, and other entertainment facilities (Briguglio and Briguglio 1996). Similar issues associated with the loss of and/or transition of the spatial landscape have been shared by Guthunz and van Krosigk (1996) who reviewed tourism development in Martinique, and Mose (1997) who addressed the impact of tourism development on the East Frisian Islands off Germany’s North Sea coast. According to Conway (2002, p. 116), “Once an area becomes a tourist ‘place,’ its resources undergo changes primarily because they are used (and overused) directly for the production and consumption of

the tourist product..." It must be recognized, however, that there have been positive effects as a result of tourism development, most notably the preservation of ecosystems and wildlife habitats in island states all over the globe (Conway and Lorah 1995).

Further, cultural sites (e.g., monuments) and practices (e.g., farming) have been appropriated or challenged in the name of tourism. For example, in St. Lucia, there have been problems with hotel staff unaccustomed to the demands of the industry. This may, according to Wilson (1996), be due to the "rhythms of island life" which require hard work for short periods of time, "...but which also [provide] plenty of free time to relax and party" (p. 93). Alternatively, in the Grenadines, young men have forgotten their obligation to household and community in favor of making a quick buck by hawking souvenirs to tourists (Price 1988). Positive impacts have been reported as well. In the Caribbean, the traditional pepper sauce developed by local farmers has become an export commodity (Momsen 1998); in the Pacific and other island destinations, handicrafts have experienced a resurgence (Harrison 1992; Kinnaird and Hall 1994); and, in Bali, traditional religious dances have been recognized and valued (Ayres 2002).

The environment, which was once protected for agriculture, has also been transformed. In the case of Corsica, Sardinia, Sicily, and Crete (Kousis 2001), this transformation has resulted in coastal and water pollution and general destruction of local ecosystems which, in turn, have had an impact on public health. In Mykonos, Greece, similar impacts have been reported (Stott 1996). The situation in Montserrat, located in the Leeward chain of Caribbean Islands, is quite different. In this case the environment turned on itself. In 1995, volcanic ashfalls signaled a change that would forever change tourism on the island. By 1997, two-thirds of the island's 39.6 square miles, including the deepwater harbor, several hotels and guest houses, and more, were off limits to residents and visitors. Concomitantly, visitor arrivals and income generated dropped, foreign exchange through banks was unavailable, and insurance companies withdrew their services (Cassell and Cassell 2005).

Estimating Carrying Capacity in Island Settings

Estimating carrying capacity in islands settings is difficult because it involves "multiple objectives and human systems" Coccossis (2002, p. 141). Due to this inherent complexity, carrying capacity as commonly conceptualized may not be adequate (Lindberg et al. 1996). The primary limitations of the common conceptualization include: (1) the relationship between use and impacts is not linear, i.e., relatively low levels of use can cause fairly high levels of impact (Hammit and Cole 1998); subjectivity plays a larger role than objective science; criteria must be tailored to the context of the destination; and, carrying capacity generally focuses on "use levels or number of visitors, yet management objectives typically relate to conditions" (Lindberg et al. 1996, p. 462). As a result, carrying capacity researchers have adopted alternative planning and management frameworks that involve a process to assist managers, planners, and policy makers with managing visitation, resources, and the social context of tourism development. Their alternative frameworks account for unique sociopolitical considerations on the island, the nature of the environment, the importance of involving local stakeholders, and that the framework may stand alone or be included as part of a larger comprehensive plan (Eagles and McCool 2002). While implementing these alternative frameworks requires several steps (see Stankey et al. 1985) Lindberg et al. (1996) suggest that a minimum of two processes should be included: agree on what is desired with respect to the social and natural resource conditions of the area, which includes values, issues, and concerns; and agree on the desired level of the conditions specified previously, or develop standards for each indicator identified. Research has demonstrated that when social, cultural, and environmental conditions deteriorate, the result is a less than desirable set of conditions for the local communities and their visitors.

Thus, comprehensive planning and management strategies are critical to establishing island residents' ability to sustain healthy and productive economic, social, and environmental conditions for themselves and future generations.

Residents and Quality-of-Life

The juxtaposition of tourist and local is at the heart of the dilemma that pits tourism (and its inevitable expansion and evolution) against the rural economy and rural people's livelihoods (Conway 2002, p. 113).

"There are over 100 definitions and models of [quality of life], though there is an agreement in recent years that it is a multidimensional and interactive construct encompassing many aspects of people's lives and environments" (Andereck et al. 2007, p. 484). Satisfaction and contentment with life as well as achievement, pleasure, belonging, and a sense of fulfillment with one's life experiences are examples of the many dimensions associated with quality-of-life (QOL) (Bushell and Sheldon 2009). QOL is also place based and shared culturally through time and space (Antonovsky 1987; Dasgupta and Majumdar 2000). It is a dynamic construct. As individuals and their external environments change, so too may their perceptions of QOL (Allison et al. 1997; Liburd and Hergesell 2009).

Quality-of-life is impacted by five interacting variables: economic health, the subjective well-being of locals, unspoiled nature and the protection of resources, a healthy culture, and guest satisfaction (Muller 1994). These interacting variables are not equal in importance, however. Muller places more emphasis on the social and cultural well-being of local residents. Concomitantly, Stone (1993) recognizes that social and cultural well-being have emotional and psychological dimensions that involve interpersonal relationships and principles of reciprocity that transcend geographic boundaries. Hence, there is little doubt that tourism development can affect residents' QOL.

In communities experiencing tourism development, residents may experience a higher standard of living (Haralambopoulos and Pizam 1996; McCool and Martin 1994; Long et al. 1990); increased tax revenues (Haralambopoulos and Pizam 1996); a greater number and diversity of jobs (Gilbert and Clark 1997; Johnson et al. 1994; Liu and Var 1986); more attractions and entertainment venues (Brunt and Courtney 1999; Long et al. 1990); improved cultural heritage (Gilbert and Clark 1997); and more. Alternatively, tourism development can negatively impact residents' QOL (Ap and Crompton 1993; Christensen 1994; Inskeep 1991; McCool and Martin 1994; Tooman 1997) by increasing traffic and parking problems (Lindberg and Johnson 1997; McCool and Martin 1994; Perdue et al. 1991); generating air, water, and noise pollution (Andereck 1994); increasing the cost of living (Brunt and Courtney 1999; Liu and Var 1986); losing resident identity and local culture (Rosenow and Pulsipher 1979); placing pressure on individuals' social lives, beliefs, and values (Dogan 1989; Lankford 1994); and increasing crime (Cohen 1988; King et al. 1991; Tosun 2002).

Few researchers have studied the impact of tourism development on residents' QOL. Instead, they have focused on residents' attitudes toward tourism development, perceptions of tourism impacts, or addressed perceived impact on the community or environment rather than the individual (Andereck and Vogt 2000; Besculides et al. 2002; Cottrell et al. 2004; Fredline and Faulkner 2000; Gursoy et al. 2002; Long et al. 1990; Tosun 2002). The few QOL studies that have been conducted address "...the way these impacts affect individual or family *life satisfaction*, including satisfaction with community, [neighborhood,] and personal satisfaction" (Andereck et al. 2007, p. 485). Andereck and her colleagues (2007) conducted a study to determine if significant differences in QOL (i.e., perceived importance level with, satisfaction level with, and effects of tourism on

QOL) existed for two resident ethnic groups – Hispanics and Anglos – in Arizona. They found that, overall, tourism is perceived to have both negative and positive effects on residents' QOL, yet Hispanics placed more importance on economic and sociocultural QOL variables than Anglos. In a study of stakeholders' perceptions of tourism in rural eastern North Carolina, Byrd et al. (2009) found that government officials were significantly more likely than residents and entrepreneurs to indicate tourism development increases a community's quality-of-life.

Researchers have used sociodemographic variables to measure the perceptions of QOL impacts or attitudes toward tourism (Girard and Gartner 1993; Snaith and Haley 1999; Tomljenovic and Faulkner 2000). Age, for example, has been associated with attitudes toward tourism development (Cavus and Tanriverdi 2003; McGehee and Andereck 2004). Findings for gender have been less conclusive. Mason and Cheyne (2000) found that males were more positive about proposed tourism development than were females. Harrill and Potts (2003) documented that female residents perceived less economic benefits associated with tourism development than did male residents. Researchers have also acknowledged an association between high levels of education and support for tourism development (Haukeland 1984; Hernandez et al. 1996). Language, length of residency, proximity to tourist activity, and knowledge of the industry also have been found to explain differences in residents' perception of or attitude toward tourism (Andereck et al. 2007; Brougham and Butler 1981; Girard and Gartner 1993; Liu and Var 1986; McCool and Martin 1994).

In addition, residents' attitude toward tourism development may be contingent upon the lifecycle of the tourism destination (Hernandez et al. 1996; Long et al. 1990; Mansfeld and Ginosar 1994; Mason and Cheyne 2000). Diedrich and Garcia-Buades (2009) questioned whether residents' perceptions of impacts could indicate where a destination is in its life cycle. They found that residents in five Belizean communities perceived there were benefits associated with tourism, but these benefits began to decline as tourism development matured within each community. Ap and Crompton (1993), Johnson et al. (1994), and Upchurch and Teivane (2000) found that after a point residents become more ambivalent or negative about tourism development. Faulkner and Tideswell (1997), however, challenged this thinking. They suggested that residents' attitudes toward tourism development are mediated by their level of involvement in the industry; they are involved in social exchange (Ap 1992; Jurowski and Gursoy 2004).

Cole (1997) and Lepp (2008) questioned whether residents' attitude toward tourism development could be due to a lack of information. While studying tourism development in the village of Ngada, Indonesia, Cole found that residents were perplexed by and upset with the introduction of tourism to their village. They did not understand the tourism process or the behavior of tourists. Lepp documented similar results in his study with residents of Bigodi, Uganda. He found that residents were suspicious, anxious, and fearful. These studies and others provide support for the notion that many residents lack the necessary information to form attitudes toward tourism development (Cave et al. 2003; Keogh 1990).

Attitudes toward tourism development may be contingent upon a community's history and culture (Manyara and Jones 2007). Cole (1997) found that past history with "outsiders" influenced Indonesian residents' response to tourism. These outsiders are often tourists, but can include government officials. Sofield (1996) and Yiping (2004) documented that the policies of government officials can constrain tourism development and, ultimately, affect residents' attitudes toward it. Ryan (1997) and Hepburn (2002) suggested that these perspectives are limiting; residents' response to tourism development cannot be understood without accounting for the political, social, cultural, historic, ecological, and legal components of the tourism system.

Lawton (2005), in a study with residents of the Gold Coast of Australia, found that the existence of tourist attractions positively influenced the majority of residents' quality-of-life. Her results were similar to those found by Faulkner and Tideswell (1997) and Weaver and Lawton (2001), but challenged those of Fredline and Faulkner (2000).

It is important to recognize that attitudes are not static (Getz 1987; Hsu 2000; Lee and Back 2006). Using data from 1995 and 2001, Huh and Vogt (2007) studied change in attitude toward tourism development among a select group of Alaskan residents. They found that age, not length of residency and gender, best explained attitude toward the economic impact of tourism development. Specifically, middle-aged cohorts (i.e., 45–54 and 55–64) held less positive attitudes about the economic impact of tourism than the young adult cohort (i.e., 25–34).

Quality-of-Life for Residents of Island Tourism

Islands that have exceeded their environmental and social visitor capacity may not fare favorably in today's tourism environment. Thus, McElroy and de Albuquerque (1996) suggest adopting a low-density approach to tourism. They favor "...controlling visitor densities, maintaining asset quality, and expanding the average length of visitor stay" (p. 57). In essence, they are proponents of sustainable tourism development, which "...supports a harmonized way of development that is ecologically responsible, socially compatible, culturally appropriate, politically equitable, technologically supportive, and finally economically viable for the host community" (Suk et al. 2005, p. 382). Sustainable tourism development also can be helpful after the fact; it can restore damaged natural and cultural resources (Trousdale 1998).

How does carrying capacity relate to sustainable tourism? Butler (1996) sees carrying capacity as an application of sustainable tourism. Carrying capacity is a process by which impacts are evaluated and ultimately mitigated for the benefit of residents today and in the future. And, carrying capacity considers the limits to tourism development; that activities can occur "without doing serious harm to the natural, economic, and social-cultural elements at destinations" (Saarinen 2006, p. 1126). Yet some believe that the sustainability concept, along with carrying capacity frameworks, ought to focus on sustaining the needs of people (Saarinen 2006; World Congress on Environment and Development 1987) and conservation (Roe 2004). This notion is reflected in the Millennium Development Goals (Roe 2004), which prioritize poverty alleviation, education, empowerment of women, reducing child mortality, improving health and combating diseases, and ensuring environmental sustainability while improving development opportunities. Limits to growth and exploitation of resources relative to carrying capacity are directly applicable to the strategies proposed in the Millennium Development Goals, all of which support quality-of-life through a range of ecosystems services that ultimately benefit and support the human condition (Chivian 2004).

Visitor Capacity and Tourism Development in the Yasawa Islands

The Yasawa Island chain consists of 16 islands and several small islets (Yasawa Island History 2010). The archipelago is located in the northwestern part of Fiji, stretching approximately 50 miles northeast, from end to end, with white sand beaches and clear blue water. The population of the Yasawas was estimated at 5,465 in 1996 (Fiji Bureau of Statistics 2007).

Tourism in the Yasawas began with Blue Lagoon Cruises in the 1950s but was not land-based until 1987. From 1987 onward, the Yasawas began to establish itself as both a backpacker and high-end resort destination. In 1972, Richard Evanson purchased Nanuya Levu Island and built Turtle Island Resort, a luxury boutique resort. In 2000, noting the increased environmental and social impacts associated with the budding tourism industry, Evanson distributed a document highlighting what was possible for a regional tourism organization – the Nacula Tikina Tourism

Association (NTTA) – in the Yasawas. After consulting with various members of the community, he put forward a vision for the NTTA (2005):

To be a Tikina in which every village operates profitable and responsible tourism related businesses, enabling development in the Tikina of enduring education and health infrastructure, delivery of financial benefits to families, and the establishment of ongoing economic independence for each village.

The NTTA has been successful with several initiatives since its inception (Bricker and Kerstetter 2006), including the development of brochures to promote budget resorts; introducing a Code of Conduct (which needs to be revisited); meetings with leaders in Fiji and the local community, which has assisted the Yasawas with information exchange, advice, and advocacy, as well as tourism grants to help local businesses; increased employment opportunities as a result of increased tourism, both directly and indirectly; and increased hospitality training for staff in the budget resorts.

Today, there are nearly 40 resorts in the Yasawas, 32 of which are community-based (i.e., the community is responsible for the management and maintenance of the resort), and most are directly linked to villages (Gibson 2008). Further, the Yasawas now hosts over 545,000 visitors per year (Ministry of Tourism: Fiji 2007), including a substantial backpacker market, which began to experience extraordinary growth in 2002. This market has been well served by Awesome Adventures (www.awesomefiji.com), which created fast and efficient transport from the mainland (Viti Levu) up and down the island chain, with periodic stops servicing all the resorts (Yasawa Island History 2010). Safe and efficient transportation via Awesome Adventures and other catamaran services has launched the Yasawas as one of the fastest growing tourism destinations in Fiji (Ministry of Tourism: Fiji 2007).

In 2005, the Ministry of Tourism assessed the social-cultural, economic, and environmental impacts of tourism development in the Yasawas. The Ministry's results indicated that a small percentage of the population overall was actually engaged in tourism in the Yasawas (Ministry of Tourism: Fiji 2007). From a social perspective, negative impacts of tourism in the Yasawas included increased consumption of alcohol, cigarette smoking, family stressors such as an increase in extramarital affairs, increase in teenage pregnancies, and increased tension in local communities due to a lack of proper stakeholder consultation both between village members and between outside investors and village members. The environment was also experiencing negative impacts from untreated land-based and marine vessel sewage discharge; increase in the use of non-biodegradable products and solid waste (e.g. plastic bags, cans, glass); and increased pressures on the freshwater supply. Some of the positive impacts of tourism noted by the Ministry included the enhancement of cultural practices including dance, handicrafts, and traditional ceremonies, and the observance of traditional protocols adhered to, which they found strengthened the communal bond within the village. The Ministry of Tourism's findings suggested that tourism in the Yasawas be developed within its environmental capacity, create a more "bottom-up" process for tourism development approvals and procedures on native lands, increase the socio-economic benefits to the local people, and reduce economic leakage.

During the same year (i.e., 2005), Bricker and Kerstetter conducted a social impact assessment within the Nacula Tikina and found that residents view tourism favorably. Residents believe tourism has: (a) increased employment opportunities, positively influencing their standard of living; (b) benefited community projects through donations; (c) enhanced environmental awareness in some villages; and (d) provided economic benefits through cruises in particular and tourism in general. There was some indication that negative impacts are making their way into the Tikina as well, however. Residents identified social impacts such as inappropriate behavior and dress by tourists, promises not kept by tourists, and some negative implications of a new economy of dollars in the village. Overall, villagers feel that tourism does and will continue to benefit their community and their children's future (Bricker and Kerstetter 2006).

To create additional baseline data, Kerstetter and Bricker (2009) also examined the meanings village residents attach to social, community, and environmental resources and if, when interpreting the meanings, they allude to social, cultural, political and/or economic realities that may have differentially shaped them. They did this by using a two-step approach to data collection. First, the authors and their translator met with the Chiefs and the residents of the seven villages in the Nacula Tikina. Respecting tradition, they began the process by meeting with the Chief of each village, presenting him with a *sevu sevu*,¹ and asking for permission to speak to the residents. They also asked the Chief and Elders of each village to select two to four individuals (i.e., at least one woman and one man) who would be interested in taking pictures of their community/environment.

Study participants were given a digital disposable camera and asked to take pictures of “things in their village that are important to them and represent what is special about their village,” as well as “things that mean the most to them or that they would miss if they moved away.” They were also asked to make a list of the photos and document what each photo represented/meant to them. After collecting the cameras, processing the film, creating photo albums for each study participant, and making duplicate copies of the photographs for the study, Kerstetter and Bricker returned to each village and asked study participants to “interpret” their pictures. The intent of this second step was to give study participants an opportunity to think about and articulate the meaning of their place.

A total of 7 women and 9 men, ranging in age from 22 to 65, participated in the study. They were farmers, spokespersons for the village, mothers, a youth group leader, village chiefs, and a women’s club president. Using a data analysis process proposed by Patton (1990) and Stedman et al. (2004), Kerstetter and Bricker discovered that village residents attach various types of meanings to the social and community resources in their village (i.e., the Fijian village, Fijian culture history and traditions, information and technology, the environment, and the impacts of tourism development).

In terms of “the Fijian village,” study participants referenced infrastructure or tangible attributes such as the village hall, the “bure” (i.e., the home), and the boat used to transport villagers to school or the mainland for securing goods and services. The meaning of the Fijian village was also represented through references to social networks and relations in the village including, but not limited to, friends and family as well as community leaders. A third meaning attached to the Fijian village was linked to the way of life within the village. For example, respondents found meaning in the way residents come together to share, help and work with each other. They also appreciated the simplicity of village life.

Fijian culture, history and tradition are also important to study participants. For many study participants the chiefly system; church and spirituality; Fijian celebrations; traditions, places and practices; and traditional crafts created meaning in their lives and were symbolic of what is special within their village. Some even perceived the church, Fijian celebrations, and traditional crafts as current or potential tourist attractions.

Being able to communicate with loved ones was especially important to study participants given that they live in a relatively remote island environment. In addition, study participants discussed how advances in technology have minimized the challenges of living in a remote village.

Having fresh water to sustaining life through conservation were environmentally focused meanings raised by study participants. They also noted the importance of having locally produced food, conserving the environment for future generations, and maintaining the environment in an effort to attract tourists.

When recognizing the positive impacts of tourism, study participants identified economic benefits, environmental benefits, social-cultural benefits, and tourist accommodations and facilities.

¹A *sevu-sevu* is a ceremony introduced by the spokesperson of the village. Guests bring a gift of kava (i.e., the local plant used for ceremonies and social purposes) to the Chief and Elders of the village and describe the purpose of their visit.

With respect to economic benefits, participants mentioned the money generated from tourists who visit the shell market or buy local foods. They also recognized indirect economic benefits such as the village's ability to build a community store. Tourism also was seen as an impetus for maintaining a clean and orderly village and as contributing to quality-of-life improvements such as a new community center. Further, because of tourism, residents hope that unique skills such as mat weaving and the building of traditional bures can be maintained.

Residents within the Nacula Tikina identified not only the pillars of sustainability (i.e., economic, social-cultural, and environmental), but also recognized aspects of village life that are important to them. For example, they recognized the importance of preserving the environment for food production as well as attracting tourists to the area. They also acknowledged the importance of maintaining their culture and Fijian way of life not only for themselves but also to attract tourists. While tourism has become an important aspect of community life, residents do recognize the limitations of its development, including its potential impact on their quality-of-life.

Summary and Conclusions

In this chapter, we reviewed the carrying capacity literature and recognized its limitations within a tourism context, including no or limited attention being given to the social-cultural environment and the community receptors within affected areas (e.g., Coccossis et al. 2001; Rowan 2009). Our case study of seven villages within the Nacula Tikina provided empirical evidence that sociocultural and community issues are important to residents and that they must be addressed if tourism researchers are to understand the capacity that exists within island destinations.

Further, quality-of-life as it pertains to residents of island destinations was discussed. Quality-of-life is impacted by five interacting variables: economic health, the subjective well-being of locals, unspoiled nature and the protection of resources, a healthy culture, and guest satisfaction (Muller 1994). The results of our case study indicate that these five interacting variables do impact residents' quality-of-life, but as Stone (1993) argued, they are multidimensional involving emotions that are initiated through interpersonal relationships.

Finally, we introduced our conceptualization of carrying capacity for small island tourism destinations. Carrying capacity from our vantage point should be part and parcel of a sustainable tourism development strategy. It should account for the needs of local residents, identify potential impacts, set limits to tourism development based on resource and infrastructural capacity, implement conservation strategies and more, including, the Millennium Development Goals (see Roe 2004). Further, the interrelated complexities of carrying capacity, or the ability of the resource to provide sustenance and support for future generations, provide an impetus for tourism planners and managers to consider sustainable development. While tourism can provide economic growth and contribute to residents' quality-of-life, it was clear through the literature and the Nacula Tikina example, that the social-cultural and ecological contexts must be considered for residents impacted by tourism development.

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Chapter 27

Quality-of-Life Values Among Stakeholders in Tourism Destinations: A Tale of Converging and Diverging Interests and Conflicts

Klaus Weiermair and Mike Peters

Introduction

To make the arguments in our chapter more comprehensive and in line with treatments elsewhere particularly in the management/business literature, we define quality-of-life (QOL) values as the sum of values accruing to stakeholders, value being defined as the quality of activities divided by the cost of acquiring these qualities (Heskett et al. 1990). Thus, the term QOL is to be understood in terms of a numerator (quality) and a denominator (its price) when talking about QOL or QOL values.

This is in contrast to the numerous tourism stakeholder studies probably best summarized by Andereck and Vogt (2000) which typically have concentrated at resident's attitudes and perceptions toward tourism and tourism development (Jafari 1987). The approach taken here is rather closely related to social exchange theory (Ap 1990) and its application to tourism destinations, whereby residents weight the personal benefits to be derived from tourism development relative to personal costs (Jurowski et al. 1997).

Next we borrow from the literature on service management the classical value triangle which usually is shown with three stakeholders, the customer, the service manager, owner or entrepreneur, and the customer contact employee (Fitzsimmons and Fitzsimmons 2008).

The service encounter triad attempts to highlight the relationships between these three parties and allows deriving a number of interesting imperatives for service management research. Figure 27.1 shows the triad and indicates possible conflict sources between the stakeholders.

Usually the value triangle and its relationship is depicted as follows:

Showing both negative and positive forces working in both directions between the points A, B, and C, this stakeholder approach is of course in stark contrast to traditional market-based models which are based on assumptions of market transparency, no institutional rigidities economic rational behavior and long-term (or sustainable) decision making and planning. It views

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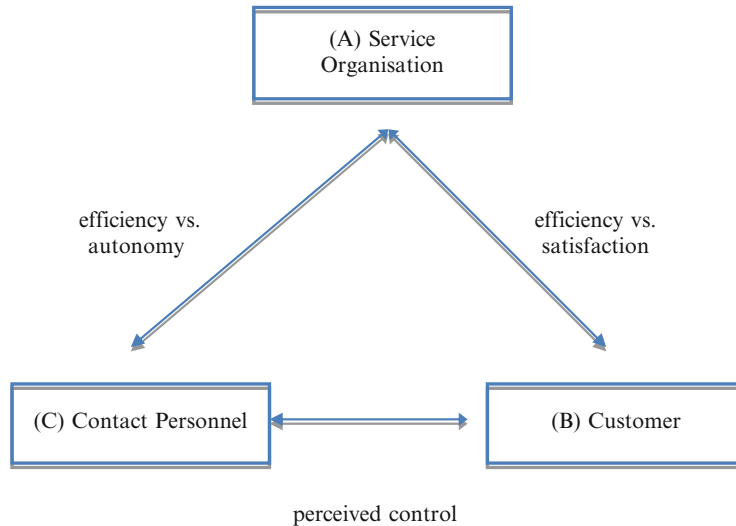


Fig. 27.1 The service encounter triad (Bateson 1986; Fitzsimmons and Fitzsimmons 2008, p. 198)

customers' (or also tourists') choice and behavior pattern as the ultimate driving force over the competitiveness and hence profitability of destinations which in turn determines the amount of factor payments to all tourism-related resources (Caves 1980; Porter 1990).

A resource-oriented perspective views firms as unique bundles of organization specific resources and capabilities determining firm's market strategies. This approach similarly criticizes the market-based view displaying firms' idiosyncratic resource endowments. It also provides arguments that markets are in state of continuous flux and make long-range planning impossible (Barney 1991, 2001; Das and Teng 2000; Grant 1991).

Even though a market-based approach could possibly provide a closed (or deterministic) model with elegant solutions, it appears too far removed from reality. As a matter of fact, in this context it could not even serve as a theoretical construct. This renders stakeholder investigations rather complex as they have to (1) enlarge the category of stakeholders in a destination on account of both interest heterogeneity and interest interdependence among stakeholders and (2) establish a priori a list of interest diverging and converging forces among stakeholders before coming up with any form of theory building or empirical testing.

This chapter proceeds as follows: The next part will describe typical stakeholder behavior in different tourism destination settings. Furthermore, the authors will provide pieces of empirical evidence for the alleged behavior from reported research findings. The final part will summarize and provide conclusions.

QOL Values and Relationships Among Stakeholders

QOL has been described and defined in numerous and diverse ways, which is also reflected in the large number of attempts to operationalize its measurement. Bortwick-Duffy (1992) or Landesman (1986) suggest three basic dimensions or perspectives regarding quality-of-life:

- QOL can be defined as the quality of one's life conditions.
- QOL can be defined as one's satisfaction with life conditions.
- QOL as a combination of both life conditions and satisfaction.

Later, Felce and Perry (1995) have added another dimension and provided a comprehensive definition for quality-of-life: According to them, QOL needs to be defined as a combination of life conditions and satisfaction with these life conditions weighted by scales of importance. The latter could be interpreted as a cost or shadow price element. This also suggests that we need to take account of individuals' personal values, aspirations, or expectations. Perdue et al. (2010) use the terms "exchange value" and "use value" which somewhat correspond to the short-term and market-based versus long-term and social theory-based concepts in our main body of treatment.

Looking at the value structure of the three basic stakeholders in the destinations in reference to the service encounter triangle, we find in the tourism destination service organizations, represented by tourism firms (entrepreneurs), employees or customer contact personnel represented by the tourism workers and consumers, e.g., tourists. First, we have to extend the analysis of stakeholders by allowing their varying life value structures using the previous three QOL categories. Among the class of tourists, we can therefore distinguish between the following groups:

1. *Residential tourists*, who traditionally look for residential property in prime location, which they often occupy only during certain periods of the year. They consequently affect the QOL values of other stakeholders such as tourism workers, restaurants, and hotels negatively as regards crowding of land, thereby raising land prices or the rental value of accommodation. However, tourists' purchases are likely to stimulate parts of the construction, furniture, and decorative business, as well as some tourism-related businesses in a positive way, thereby having a positive QOL effect on a subset of entrepreneurs.
2. *Individual high quality tourism* typically demand higher quality and higher priced resources with a smaller crowding out effect; we therefore should expect their QOL values to conflict with the interests and values of all those resources within the destination which are committed to all forms of mass tourism.
3. *Mass tourism* usually provides a standard quality at lowest possible cost through economies of scale and scope. Its values clearly stand in contrast to and/or constrain the value of those stakeholders who display a higher quality choice behavior pattern. On the other hand, mass tourism will benefit those in the destination who otherwise could not afford high cost priced infrastructures and higher priced consumption (e.g., high costs for food accommodation and sport) as well as those who prefer highly commercialized mass consumption practices.

Similarly we could analyze other smaller tourism segments such as adventure/extreme sports, cultural, or retail tourism in order to investigate to what extent they have positive or negative externality effects upon the value system of other major stakeholders.

Among the class of tourism firms (entrepreneurs), we can distinguish at least three categories with differing value systems:

1. First of all the *classical, market-growth, and profit-oriented entrepreneur* who pursues different market and competitive strategies according to their potential and market possibilities (Schumpeter 1934). The firm could either be financed by local or foreign capital. If profit maximizing is long-term oriented (which is likely to be found more frequently with local ownership), positive or negative externalities upon other stakeholders values will be more lasting (whether positive or negative). A priori it is difficult to specify whether or not and to what extent such entrepreneurs will conflict in the long run with other stakeholders' QOL values. In the short run, particularly if the entrepreneur engages in innovative new ways of carrying out business activities, he/she is likely to create economic and social disruption (Schumpeter 1949) affecting negatively traditional values (Peters and Weiermair 2001).
2. The second type of entrepreneur found particularly in traditional tourist regions throughout Europe is the owner manager/lifestyle entrepreneur usually continuing a family business depicted in economic texts as "sufficing" instead of maximizing behavior (Ateljevic and Doorne 2000; Shaw and Williams 2004). This type of entrepreneur derives great value from

his/her standing in the community and often assumes positions of public authority within the destination. Frequently, this type may block entry of new competitors and/or new ideas (Weiermair 2001). If he/she is a benevolent patriarch, he/she may provide good value to other stakeholders (particularly the tourism work force). At least in the past, this type of entrepreneur has had considerable market power, enabling resource decisions, which have curtailed the value of most other stakeholders.

3. Finally, we could also list the public entrepreneur in the form of public enterprises run by the local community, a regional government or the state. To the extent that public enterprises are said to be less responsive to the market, they would raise the value of their own resources (management and workforce) at the expense of tourists or local residents. If they happen to be longer-term oriented working in well-functioning democracies, they are likely to add considerably to both the public good or put differently through their social responsibility will increase in a fair and equitable way the QOL values of all stakeholders including the future generation (Stiglitz 2002).

The next category of stakeholders is the local population in a destination. Here, a distinction should be made between those working in or being directly or indirectly affected by tourism and that part of the local population in the destination who have no relationship with tourism at all. A priori it is again difficult to specify whether or not the local population's QOL values are positively or negatively affected by tourism. In smaller destinations, tourism can create additional public infrastructure such as swimming pools, cableways, or larger and more diversified public health facilities, more choice in restaurant food, and entertainment. On the negative side, tourism may cause pollution and crowding-out effects, raising prices for food and accommodation and thus negatively impinge on the quality and cost of purchasing these qualities, thereby lowering the value of life quality for the local population. Those who directly or indirectly work for tourism can benefit from tourism through income derived from these activities, provided this income is earned at acceptable cost in terms of working and living conditions and/or simply the opportunity cost of alternative employment. Generally speaking, mass tourism can be expected to affect both the quality of working life and its costs (wages/profits) more negatively than individual high quality tourism. For the quality of working conditions in tourism, just like in any other industry, is to a large extent the result of effective managerial practices with respect to the human organization (Bloom and Van Reenen 2006; Ross 1995). The inability of entrepreneurs to delegate (through longer hours of work and overtime and stress) will have a relatively more negative impact on the quality of working life in comparison to better-organized forms of work in teams. When dealing with the quality of working life or life values in general, we have to further distinguish between three classes of tourism workers, e.g.,

- Those who only come for temporal work as seasonal workers from outside the destination
- Those who work regularly every year as seasonal workers from outside the destination
- Those who are permanent residents of the destination and work there on an annual or seasonal basis

Clearly, those three groups do not have the same expectations regarding QOL values. Whereas the first two groups may only come to work in the destination to earn the most money in the shortest period of time, possibly accepting overtime work and lower working and living conditions in exchange for more earnings, those who are permanent residents may demand more in terms of quality of work and QOL in general including highlife values. In turn, all three categories of tourism workers affect the QOL enjoyed by tourists in the service encounter. A priori it might be argued that those workers who reside in the destination where they work can better communicate and/or market the destination's and tourism enterprises' organizational culture than temporary and possibly foreign workers with differing culture and language backgrounds.

Finally, we have to list policies and actions of the tourism community such as town councils or local tourism boards. Their influence can reach far in affecting or benefiting all stakeholders in terms of QOL values.

To a large extent, much of this also depends on the political and economic clout of stakeholders as well as the amount of value available to be distributed out of total tourism receipts in terms of a “destination surplus.” Put differently, the question of distribution of earnings in the destination very much hinges upon prior production, growth, and competitiveness of tourism services in the tourism destination. Last but not least and to complicate matters even more, we must realize that in the end all quality-related phenomena remain subjective perceptions (Weiermair 2000).

Some Empirical Evidence Regarding the Interdependence of Life Values’ Enhancing and/or Deteriorating Factors Among Destination Stakeholders

Again we attempt to highlight relevant research areas in the field of QOL regarding the three stakeholder groups of tourism destinations.

Entrepreneurship and Quality-of-Life

Surveys of small tourism enterprises show that the food and accommodation industry displays statistically significant lower survival rates than other branches of economic activity. In particular, the first phases of enterprise growth are critical (Frank et al. 1995). The literature reports early stage management hurdles that lead to severe delegation and cash flow problems (Flamholtz 1990; Greiner 1972; Scott and Bruce 1987). The rapid changes of the industry structures and the challenges emerging through globalization, competition, professionalism, and industry concentration both vertical and horizontal, consumer rights and stricter regulation imply that many lifestyle entrepreneurs are quite unprepared for these threats emerging from the external environment. Many of these enterprises, notably in the food and accommodation industry, who survived their incubation period, are facing very serious strategic problems, and high levels of debt often leading to bankruptcy (Hartl 1999).

Not surprisingly, research on entrepreneurship in tourism is increasingly and closely linked with research areas such as small tourism enterprises (Lerner and Haber 2000; Thomas 2004; Williams and Peters 2008) or family businesses in tourism (Getz and Carlson 2000; Hegarty and Ruddy 2004). Shaw and Williams (1998) have identified two different modes of small business entrepreneurship: “non-entrepreneurship” and “constrained entrepreneurs.” The first group shows similarities with lifestyle entrepreneurship, whereby would-be entrepreneurs move into tourism destinations for noneconomic reasons; they typically establish enterprises (mainly with personal savings) where they enjoy being their own boss (Carlsen et al. 2008). Many of these non-entrepreneurs constitute owners who have retired from former professions and perceive tourism and hospitality SMEs as their way to enjoy a nice destination while generating some income to sustain their lifestyle. Research in the United Kingdom supports Shaw and Williams’ (1998) findings; e.g., Szivas (2001) has investigated motives of self-employed people in tourism. Their motives were centered on their desire “to work in pleasant surroundings” and to “establish their own business” [p. 168]. Shaw and Williams (1998) labeled this group of aging owners “non-entrepreneurs” because they showed a lack of business experience and strategic qualification (Carland et al. 1984). The second group of “constrained entrepreneurs” constitutes younger

people with economic growth motives and former professional experience in tourism and other industries. Still they demonstrate many lifestyle motives to explain their activities and the capital required usually is family raised. Nevertheless, they demonstrate some entrepreneurial attitudes toward innovation and product development, as well as toward customer values and needs (Peters et al. 2009).

Another interesting study of tourism entrepreneurs' motivational structures was carried out by Getz and Carlson (2000) who discovered two clusters of entrepreneurs in Australia. They labeled them "family first" (representing 2/3 of total entrepreneurs) and the "business first" entrepreneurs. Family driven entrepreneurs are motivated by emotional factors associated with their families, as well as by the optimization of their leisure time. All these noneconomic and non-growth oriented motives can be termed quality of life factors. Every entrepreneur is characterized by an individual trade-off between quality of life and workload. The perception of this relationship is a main driver of activity. The relationship of entrepreneurial workload and quality of life certainly depends upon personal wants and individual characteristics or personality traits.

Locals and QOL

A few scholars in tourism research have investigated QOL perceptions of residents in tourism host communities (for some recent work see, e.g., Andereck and Vogt 2000; Bachleitner and Zins 1999; Byrd et al. 2009). As Perdue et al. (1999) have indicated there are three relevant studies which examine the influence of tourism on residents' perception of QOL. Allen et al. (1993) show that residents' perception of community life declines when tourism is climbing up the tourism life cycle suggesting the lower the level of tourism development the better their perception of community life (Perdue et al. 1999). Interestingly, locals' "support for tourism development increased with increasing levels of actual development, but reached a threshold social carrying capacity level beyond which attitudes became less favourable" (Perdue et al. 1999, p. 166). Another study of Perdue et al. (1995) using multiple objective indicators of QOL in all counties of North Carolina highlighted the relationship between tourism development and per capita income as well as crime statistics. Income per capita and the quality of health care facilities increased with tourism development, however per capita number of crimes decreased with the increase of tourist arrivals (Perdue et al. 1995). In a longitudinal study Carmichael et al. (1996) could highlight that QOL perceptions in a tourism community vary over time and might depend on the phases and initiatives in tourism development. Their study shows that in some time periods during the 1990s, residents in Connecticut experienced a decrease of QOL after the opening of a Foxwood Tribal Casino in 1992. The perception of local residents was that crime had increased and heritage or traditional values were negatively affected. According to Andereck and Vogt (2000) early studies on residents reactions or feelings toward tourism development can be divided into studies which have a focus on tourism impacts and studies which have a tourism attitude focus. The first category is specifically focused on social and environmental impacts (Ap 1990; Milman and Pizam 1988), while the second stream of research puts a stronger focus on the perception of certain regional issues as they were affecting the (subjective) view of residents (Allen, et al. 1993; Lankford and Howard 1994; McCool and Martin 1994).

Tourists and QOL

The development of the welfare state in many parts of Europe has fostered the increase of a better QOL through such government supporting measures such as reducing overall working hours

from 2.111 h in 1988 to about 1.800 h by 1995 (Richards 1999). Hence, tourism consumption has become a “contested element of social rights in many parts of the world” (Richards 1999, p. 197). In contrast to other branches of economic activity, consumers in tourism (tourists) typically purchase and consume a whole range of services, which together make up the “holiday or vacation experience.” Thus, tourists tend to base their judgments on the quality of and satisfaction with a vacation experience on all components of a complex tourism system. These components are captured by the “tourism value chain” underlying both the production and consumption of holiday or vacation experiences (Bieger 2008). Since all relevant services contributing to the holiday or vacation experience take place in the context of a tourist destination, tourism researchers have accepted tourist destinations as the relevant unit for competition and/or benchmarking analyses. This also applies to the tourism value chain which constitutes the total customer (tourist) value associated with the holiday experience at a destination (Bieger 2008). It is irrelevant whether tourism services comprising the tourism value chain are produced and distributed by a multitude of different tourism enterprises, or whether they are produced and sold by a single firm such as a tour operator. The important aspect to consider is the holistic character of the consumer act. The consumer (tourist) judges the total holiday experience, even though tourists do experience a multitude of individual service encounters and can also evaluate their inherent qualities (Weiermair 2000).

As shown elsewhere, tourists’ satisfaction patterns in addition to being associated with pretrip, en route, destination and return trip services/experiences along the tourism value chain hinge also upon a whole host of other characteristics and expectations of tourists about leisure and life in general (Neal et al. 1999; Sirgy 2009). The latter type of research findings does not reject our previously entertained working hypotheses of differing value perceptions among high quality individual versus low quality mass tourism stakeholders but allows a further refinement of value perceptions for specific tourism and tourist categories and compare them with those of the other stakeholders in the destination.

Finally, we also need to analyze the way in which tourism organizations and local governments affect the QOL in destinations through specific policies and measures concerning tourism development, management, and marketing. To the extent that local and/or community governments are representatives of the destination’s stakeholders, one should be able to observe the same converging or diverging QOL expectations and projections at the level of local governments. Depending on political perspectives, the will to survive politically and leadership capabilities, government decisions, and actions may affect all or only some stakeholders positively or negatively, and the effects may differ in the short and long run (Williams et al. 2009). Much depends here also on capabilities to react and on management of change (Keller 2009).

Conclusion

The chapter has attempted to provide a more comprehensive view of destination stakeholder values and their interrelationships. In so doing, the market-based view has been augmented by fragments of social exchange theory and service management theories. In this context, the QOL values of tourism entrepreneurs and local government and tourism organizations, absent in most QOL studies in destinations, have been added. By providing such an overview concerning the mechanics and dynamics of QOL value perceptions among destination stakeholders, an attempt has been made to provide an analytical framework within which specific tourist destinations at specific periods of time with specific tourism characteristics can be examined.

As shown elsewhere, an effective management of tourism destinations requires the pursuit of both resource stewardship and the fulfillment of tourist satisfaction (tourists’ quality of leisure life) (Ritchie et al. 2001). This invariably involves the balancing of present and future QOL

expectations of all destination stakeholders. Frequently, long-term market forces and/or interest groups pursuing sustainable tourism development solutions are absent in many destinations which in consequence can lead in the long run to an early decay of QOL values for all tourism destination stakeholders. In this case, all individual stakeholders by attempting to maximize their short-run QOL values and with everybody following the same demand pattern end up with diminished unique resources, thereby lowering the long-term QOL values of all destination stakeholders.

In order to better understand the creation, changes, and interrelationships of QOL values among and between destination stakeholders, a pure market-based analytical view of destinations is inadequate and has to be enhanced by social exchange theory. This in turn allows a much more differentiated approach with respect to the varying characteristics and QOL expectations of an enlarged number of destination stakeholders. Thus, we could show and partially also empirically verify the different QOL expectations of tourism entrepreneurs and tourism workers. Similarly, different categories of tourism and tourists such as residential versus nonresidential, individual versus group tourism, or pure recreational versus sports and adventure tourism have been shown to differentially affect each other as well as the QOL values of all other major destination stakeholders. Empirical evidence for some of these converging or diverging QOL expectations among destination stakeholders has been provided, and it can be hypothesized that the stage of tourism development influences these expectations (Weiermair et al. 2007). By distinguishing relationships among multiple classes of destination stakeholders with differing QOL expectations and their changes over time, we are also able to better understand the mechanics and dynamics of tourism development notably the destination life cycle for specific destinations in specific moments of time as the two prototype destination developments below illustrate:

- *Prototype 1:* The slow and sustainable development into a destination from a primary resource position displaying a long and drawn-out destination life cycle with development initially with part-time tourism and part-time farming or fishing based on a few entrepreneurs, most of them of the lifestyle type with satisfying behavior, strong local control, and only slow and gradual changes of the tourism infra- and supra-structure, high degree of authenticity, and a relatively high homogeneity of all QOL values and expectations among stakeholders. In this category, we often find smaller tourism communities, such as several islands in Greece (e.g., Limnos) or sustainable tourist destinations such as nature or national parks.
- *Prototype 2:* Similar start in rural environments with natural attractions but quickly take off through external capital and know-how and involvement (often tourism development through multinational hotel chains or tourism developers insisting on high and quick returns to capital and workers enjoying high wages on a seasonal basis, e.g., workers too are interested in short-term gains only). Tourists receive novel and frequently multiple option products and services in larger quantities supplied either to specific market segments or to a constantly changing clientele. Again in the short run, QOL values are likely to be high among all stakeholders which can change already in the medium run as previous resource owners have quit, sold out, or simply retired. Put differently, the tourism industry, tourism enterprise, and tourism destination life cycle coincide and decline together leading to a downward spiraling of QOL values for all stakeholders. In this category, we find the fast-growing destinations of the 1960s and 1970s, such as the Costa Brava (Spain) or Pattaya (Thailand).

These are two extreme prototypes tourism, but QOL developments of stakeholders along a continuum of differing destination structures and characteristics can be observed in concrete terms.

While tourism researchers have in the past focused on residents' QOL perceptions, there are only a few empirical contributions highlighting tourism entrepreneurs' and tourism workers' QOL perceptions. Especially, research in the field of entrepreneurs' satisfaction with their profession is still missing, but it is needed to assess how individual quality of life might influence new tourism ventures in the respective region. Another interesting research question is what

measures and policies can support QOL for entrepreneurs and how cooperation and clustering can enhance the collective regional competitiveness.

Further research might also deal with the trajectory of value transition by different stakeholders (Perdue et al. 2010) and their evolution as affected by the role and strength of alternate forms of destination governance. The interaction between destination governance patterns and its influence on the value of stakeholders which is or isn't represented in local, regional, or territorial or central governments by elected stakeholders officials is a big challenge for tourism research. Destination networks and power distribution among network players both influence and are influenced by value perception in a certain cultural and economic environment (Beritelli et al. 2007). Within this field of research, one should attempt to shed more light upon the role of leadership and management processes in destination management and its impact on the creation or maintenance of sustainable and equitable values. Much of the present debate both in terms of theory and practice seems to suggest that a major force is the capability of destination management to manage change toward a sustainable consensus. At the macro-level, governmental institutions can foster change management processes, e.g., by the provision of public awareness concerning necessary changes toward tourism through attempts at transforming values and behavior of certain stakeholder groups (e.g., lifestyle entrepreneurs). Another policy intervention is the support of new ventures or innovations in tourism development, mainly with the help of educational measures which increase stakeholders' qualifications to manage and critically reflect transformations in their tourism destination (Weiermair 2008).

Finally, quality-of-life values display tourism value measured with growth variables such as tourism-generated income. Perdue et al. (2010) discuss the balance as an alternative paradigm and focus on social, environmental, and economic impacts as critical measures of successful tourism growth. They highlight the noneconomic focus of tourism and emphasize the improvement of community life by enhancing amenities or reducing poverty. Tourism research can help to operationalize these noneconomic constructs and introduce them into future QOL research of tourism destination stakeholders.

Tourism policy needs to create the framework to undertake such investigations and should support research initiatives, which holistically attempt to measure stakeholders' QOL perceptions. In the long run, these policy measures help to clarify the role of tourism development for QOL in tourism destinations and therefore can become a strong political tool to optimize destination governance patterns.

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Chapter 28

Stakeholder Engagement in Tourism Planning and Development

Lisa C. Chase, Benoni Amsden, and Rhonda G. Phillips

Introduction

Tourism development impacts the quality of life (QOL) of residents of host communities in numerous ways. Many communities have come to rely on tourism as a way to diversify incomes in local economies, yet tourism has a reputation for providing only minimum wages in the service sector with few opportunities for advancement. Recreation and tourism are sometimes credited with promoting environmental conservation, but are more often accused of contributing to environmental degradation. Tourism creates concentrated stress on natural and human-made systems that may not have been designed to withstand heavy use, such as water systems, roads, and waste disposal. Cultural attractions may be supported by tourism and even created for tourists, yet tourism can diminish the small-town charm and sense of place appealing to residents and tourists alike (Krannich and Petrzela 2003).

Negative impacts notwithstanding, there also may be positive impacts in quality-of-life of residents of host communities arising from tourism development. These impacts may be economic, environmental, and sociocultural, such as increased currency flow, increased support for conservation efforts, or more local involvement in decision making (Sirakaya et al. 2001). People who live in tourism-dependent areas may have multiple perspectives on tourism development's impacts and how their quality of life is affected. They have different "stakes" in tourism development, and do not always speak with one voice. We agree that "although some try to present a definitive argument as to the impacts of tourism on community development (i.e.,

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promotes or destroys the overall quality of life), the most basic argument presented in much of the literature is the need to more actively involve all persons affected by proposed development” (Jamal and Getz 1995, cited in Sautter and Leisen 1999, p. 313). This is not to suggest that stakeholder engagement in tourism planning and development is simple, straightforward, or uniformly effective. Engaging stakeholders to effectively increase quality of life of residents of host communities has challenges, especially in developing countries (Blackstock 2005; Tosun 2000).

In this chapter, we define the residents of tourism-dependent areas as “stakeholders” and consider an aggregation of stakeholders as a “community.” The chapter begins with a discussion of stakeholders and their varied perspectives on tourism development. We examine the reasons why stakeholders may be engaged in planning for tourism development as well as a variety of methods for doing so. We present three case studies illustrating different ways of engaging stakeholders and understanding quality of life, followed by a discussion of challenges. We conclude with guidelines for engaging stakeholders in tourism planning and development.

Stakeholders

A stakeholder is someone with direct interest or involvement in a particular issue (Decker et al. 1996). The full range of stakeholders in tourism planning and development includes both those who benefit from positive outcomes of tourism development and those who experience problems, or are concerned they may experience problems. Stakeholders also include those who influence or make decisions about how development is managed (Weiss 1983). Stakeholders typically include individuals and groups that have legal standing, political influence, and power to block implementation of a decision (Susskind and Cruikshank 1987).

Examples of stakeholders in tourism planning and development include residents of host communities, businesses that cater to tourism (hotels, restaurants, attractions, gas stations, and souvenir and specialty stores), chambers of commerce, local government officials, environmentalists, farmers, and landowners. Some of these stakeholders, such as chambers of commerce and environmental groups, may be well organized. Others, such as residents frustrated by tourism traffic during their daily commute, may not be organized at all.

Communities of place are composed of various stakeholders whose quality of life can be assessed by different indicators. Costanza et al. (2007) define QOL as “a multi-scale, multi-dimensional concept that contains interacting objective and subjective elements.” Quality-of-life indicators can be divided into subjective and objective categories, where subjective indicators reflect a stakeholder’s perceptions of satisfaction in a variety of life domains including work life, family life, social life, and leisure life. Objective indicators include external evaluations of income levels, family life, social life, and health (Sirgy et al. 2000). Indicators share the common value of improving quality-of-life of people and places (Wong 2006). Because of this characteristic, indicators represent a valuable way to embed quality-of-life concerns and considerations.

One method to gauge a host community’s quality of life is by measuring and aggregating the quality-of-life indicators of various stakeholders. Tourism development can influence quality-of-life in positive and negative directions, depending on the stakeholders’ perspectives. To illustrate how this works, let’s take a look at a hypothetical example and assess how quality life varies for different stakeholders. Although not based on a specific community, the following example is an illustration of the way tourism development may affect stakeholders in some communities.

Stakeholders in Playa Azul

Playa Azul was a remote fishing village with pristine stretches of white sand beach and turquoise water. Tourists occasionally happened upon Playa, and many fell in love with the natural beauty, peaceful ambiance, and generous hospitality of the villagers. Marco, a wealthy investor from Ciudad Grande, was no exception. He envisioned Playa Azul as an ideal site for a luxury resort. A savvy entrepreneur, Marco quickly obtained the necessary permits and built a grand resort with a restaurant and casino.

As a stakeholder in Playa's tourism industry, Marco was fortunate. His hotel was an immediate success, attracting celebrities and others willing to pay for luxury and privacy. Marco was pleased that he could provide jobs for Playa Azul villagers, and he enjoyed spending time entertaining at his Hotel Playa Azul. Marco would say that his quality-of-life improved because he spends more time in a beautiful place, enjoys his work more than before, and he makes even more money than before.

Pablo used to work as a fisherman in Playa Azul. His family usually had enough fish and coconuts to eat but fresh fruits and vegetables could be difficult to obtain. When the resort was built, Pablo quit fishing and took a job maintaining the boats and landscaping at the resort. He makes more money now and has greater access to fresh fruits and vegetables and other foods that were not available before. Pablo misses fishing as a livelihood, but he feels his quality of life has improved somewhat because he can provide better food and more money for his family.

Ricardo was a fisherman like Pablo. But unlike Pablo, he did not want to stop fishing when the resort was built. He tried to continue fishing in Playa Azul but found that overfishing and pollution threatened his livelihood after the resort was built. Ricardo and his family moved to another community that had yet to be discovered by tourists. He feels that his quality of life decreased as a result of the tourism development in Playa Azul.

Roberto and his family have lived in Playa Azul for generations – and they refuse to move. Roberto hates the tourists, the resort, the pollution, and the traffic. While he doesn't like living there now, Playa Azul has always been his home and he doesn't want to leave. Roberto feels that his quality of life has decreased dramatically. Likewise, Sirena is a basket weaver living in the village of Playa Azul. She sells handicrafts to the tourists. She misses the quiet life pre-resort, but she has more customers, more money, and more things now. She feels that her quality of life has only slightly improved.

Not far from Playa Azul, the small village of Playa Rosa is thinking of developing opportunities for tourism. They look at successes like Andaman Discoveries in Kuraburi, Thailand and wonder if community-based tourism can happen in their village (Garrett 2007). Kuraburi has developed tourism in a way that preserves the local culture and environment. Residents of the host community benefit from tourism development, and negative impacts are minimized. Residents of Playa Rosa ask how they can attract the right amount of tourism for their community and the right kinds of tourists that appreciate their culture and environment without degrading it. Can they control tourism development to increase quality of life of residents of host communities?

Stakeholder Quality of Life and Traveler Motivations

Different types of tourism affect resident quality of life in different ways. Plog's psychographic model of traveler motivations focuses on the traveler's perspective (Fig. 28.1) as a host community or destination develops for tourism (Plog 2004). Environmental quality and cultural integrity are high when the first venturers arrive at a destination, as in the case of Playa Azul when it was

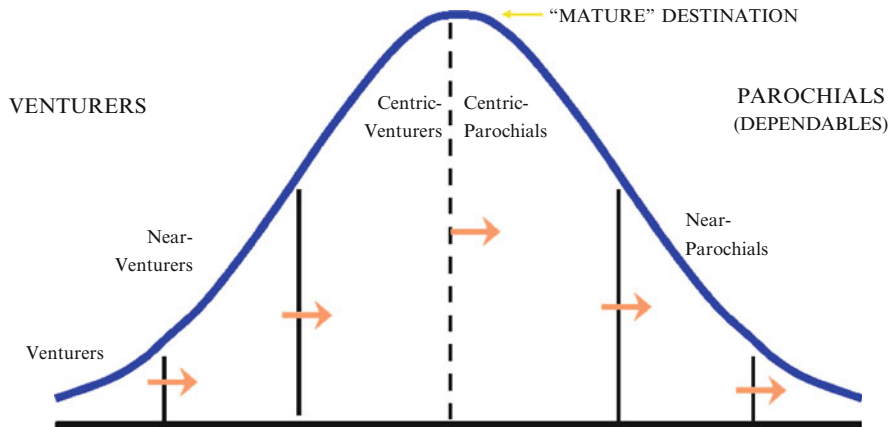


Fig. 28.1 Plog's psychographic model of traveler motivation

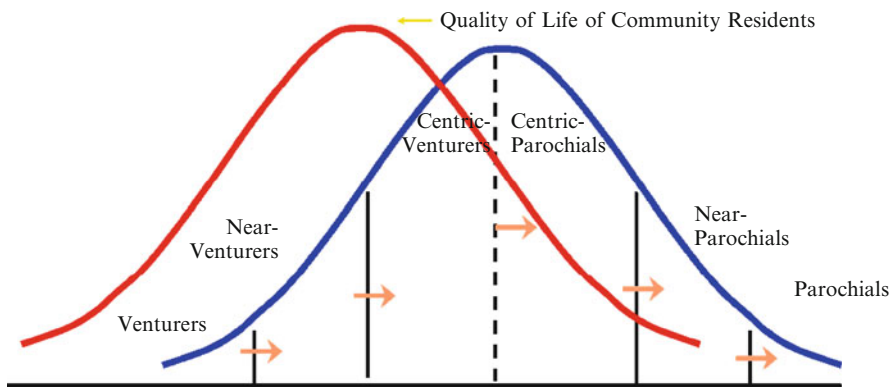


Fig. 28.2 Quality-of-life curve of community residents overlaid on Plog's psychographic model of traveler motivation

relatively undiscovered. As a destination develops tourism amenities, parochials will be attracted in increasing numbers, depending on the comforts and amenities provided. At the peak of the bell curve, the destination is substantially developed for tourism, and some losses of environmental quality and cultural integrity have likely occurred. Playa Azul was at the top of bell curve when Hotel Playa Azul was completed. If a destination loses its environmental quality and cultural integrity, venturers will move on to new destinations. As environmental quality and cultural integrity continue to degrade, parochials may also move away in search of fresher destinations, leaving the host community with degraded environmental and cultural resources and low demand from tourists, venturers, and parochials alike.

The quality of life of residents of host communities may have a bell-shaped curve similar to the demand curve in Plog's model of traveler motivations. However, the peak of the curve is situated to the left of the peak of Plog's curve (Fig. 28.2). Quality of life for many stakeholders that are residents of host communities may increase as venturers bring money and positive interactions to new destinations. Venturers do little to degrade the natural environment, and they may enhance cultural integrity as they respect and support local traditions. When larger-scale tourism development begins, quality of life for some residents is likely to decrease as they must adapt to changes in the economy, environment, and culture. As in the case of Playa Azul, some residents will find new jobs and others will move away.

In places like Playa Azul, striking an appropriate balance between sustainable development and conservation of the culture and the environment is a challenge that can be aided through deliberate engagement of stakeholders during tourism planning and development. Examples of this engagement from the tourism planning literature emphasize the importance of public participation and contend that the public often perceives the negative impacts of tourism development as being greater than the positive economic gains, resulting in negative feelings toward tourists and tourism (Keogh 1990). These studies often call for community-oriented or participatory approaches to tourism planning to provide adequate information to everyone involved and address perceived and likely negative impacts on quality of life of residents of host communities.

Why Engage Stakeholders

Involving residents and other stakeholders in processes, activities, and decision making that influence their quality of life is critical. Engaging people in decision making and building networking connections is often expressed as building social capital (Crawford et al. 2008). In turn, “by building social capital one can diminish social exclusion and promote healthier communities through partnerships with a shared sense of the public good” (p. 2). Social capital is of central concern for most communities – those with more tend to fare better on many fronts, and this impacts individual and aggregate quality of life. Further, when stakeholders are involved in processes and decision making, projects, programs, and policies are likely to have better support if people are vested (have a stake) in them.

Stakeholder participation has roots in the business ethics/management and public administration fields (Byrd 2007). Freeman, in his 1984 seminal work, *Strategic Management: A Stakeholder Approach*, pioneered the concept for applications in organizational management. A central theme of stakeholder theory is its normative aspects. As Byrd (2007, p. 7) explains, “...the reasoning behind an organization participating in an activity is because it is the right thing to do. Identification of a stakeholder, from this aspect, is based on the stakeholder’s interest in the organization, not the organization’s interest in the stakeholder....Based on this assumption, all stakeholders need to participate in determining the direction of the organization in which they have a stake.” This idea of democratic representative has even deeper roots – emerging in the 1960s, advocacy planning and citizen participation forged new paths into the arenas of inclusion of citizens impacted by myriad public policies. It is not only the *right* thing to do to engage stakeholders, it is critical for tourism planning and development. As Jamal and Getz (1995) found a while ago, stakeholder issues (identification, selection, etc.) become critical considerations for collaborative tourism planning and development efforts. Stakeholders are thus not just intermediaries but can play a vital role in tourism planning and development, incorporating their desires for future outcomes that influence quality-of-life (Meyers et al. 2010).

Quality of life is of key concern for stakeholders and those trying to identify and measure it. There are numerous approaches to defining quality of life, and it is an inherently “political” process because it involves competing ideologies that define what is considered a good life (Phillips and Budruk 2010). Often, a utilitarianism approach is used – these include rankings, for example. It basically implies that individuals will maximize their quality of life based on available resources and desires and driven by economic theory (Diener and Suh 1997). There are, however, many concerns about using this approach to gauge quality of life including the inability of some residents to access and use tourism facilities: Just because these resources exist in a community doesn’t mean it positively impacts residents’ quality of life (Phillips and Budruk 2010).

A more comprehensive approach is one that combines both objective and subjective quality-of-life measures. This union of both research traditions, objective social research and subjective

quality-of-life research, brings a richer understanding of community conditions if developed in conjunction with community stakeholders (Parkins et al. 2001). In a variation of this, Sirgy and Cornwell (2001) provide a model that incorporates these considerations, with “community” and “other” life domains. Community pertains to one’s perception of the overall community while other life domains pertain to non-community areas such as work, income, etc. Satisfaction with community aspects was found to play a significant role in overall quality of life, further validating the need to incorporate community level analysis and aspects thoroughly into quality-of-life considerations.

Measuring quality-of-life is a difficult undertaking but one that is necessary. It is reflective of stakeholders’ perceptions, desires, and needs and must be included to more fully gauge conditions within communities. Engaging stakeholders so that they can have meaningful participation in tourism planning and development will in turn influence quality of life.

How to Engage Stakeholders

Designing an effective stakeholder engagement strategy is far from straightforward. As a general rule, a planner or developer seeking to engage stakeholders should (1) identify important stakes, (2) be inclusive and resist powerful special interests that might want decision making to exclude other stakeholder interests, (3) consider using multiple methods for incorporating stakeholder input, (4) use effective strategies for communication to encourage constructive deliberation and understanding, and (5) find ways to balance the interests of different stakeholders in reaching decisions (Leong et al. [in press](#)).

Evaluating the effectiveness of different participatory methods is difficult, although tools exist to help planners and managers determine appropriate participatory methods depending on the context (Chase et al. 2004; Fiorino 1990). In their evaluation of public participation methods, Rowe and Frewer (2000) distinguish varying levels of public involvement. Low levels of participation are typically utilized in more knowledge-based decisions, and high levels of participation are more appropriate in value-based decisions (Chase et al. 2000). Below are brief descriptions of some of the major stakeholder engagement techniques (Lauber et al. [in press](#)):

- *Information dissemination* refers to techniques that distribute information intended to reach out to large audiences. One avenue is to use mass media outlets, such as press releases, newspaper inserts, and press conferences or interviews. Other print media, such as fact sheets, newsletters, brochures, issue papers, or progress reports may be used to disseminate information through mailing lists or at agency offices and visitor centers. These materials are readily disseminated electronically, using agency web sites, Listservs, electronic mailing lists, and social networking sites such as Twitter and Facebook.
- *Public meetings* are short one-time events that afford stakeholders an opportunity to learn and provide input. Participants hear relevant information and then have an opportunity to ask questions and comment in a public forum. In the past, many public meetings followed strict “public hearing” formats, where participants were allowed a limited time to state their position. Planners now are experimenting more with dialogue-based approaches to public meetings.
- *Solicitation of comments* can be formal or informal. A formal solicitation of public comment may be issued, requesting that written comments be sent on a specific topic by a specified date. Comments are typically sent by letter, email, or the Internet. Planners may also let stakeholders know they are open to feedback through less formal means, some relying on technological innovations, such as blogs and interactive websites. When planners solicit comments,

they often hear from the most passionate stakeholders or those with time to respond to the solicitation. This must be considered when planners decide how to incorporate comments into decisions.

- *Surveys* are typically employed when planners want all perspectives regarding an issue, including the “silent majority.” A systematic survey to collect data can be conducted by telephone, mail, email, Internet, or in person. The sampling frame (target audience of the survey) may be the general public, or the survey may focus on specific stakeholder groups. Survey responses are usually kept confidential, which may encourage input from stakeholders who would not typically communicate through open houses and other public means. Survey data can be an important source of information for decision making, providing data on beliefs and attitudes that may be overlooked when only the most vocal stakeholders are heard.
- *Trainings and technical assistance* are interactive public outreach and education efforts where experts present information. Stakeholders gather data, ask questions, and offer feedback. Trainings may last a few hours to a day and may occur once or meet regularly for a specified period of time. They often feature a number of presenters with multimedia presentations addressing various aspects of tourism planning and development. Trainings may be followed by one-on-one technical assistance to provide individualized instruction and support.
- *Focus groups* bring together a small group of stakeholders to discuss issues of concern. They are frequently used in market research and political analysis to provide information on stakeholder opinions. Focus groups typically meet only once and stakeholders share information from their own perspectives. The discussion of a focus group can provide in-depth information beyond that attainable through a survey, but focus groups are limited in terms of the number of people that can participate and share their views.
- *Workshops* are typically one-time events lasting from a couple of hours up to a full day. Planners may ask workshop participants to complete some type of task to further tourism development. The particular task may include developing a list of information needs, generating a set of development alternatives, or identifying possible concerns about a particular alternative. By engaging stakeholders in these workshops, planners broaden stakeholder understanding about development and ensure that the needs and concerns of different stakeholders are considered fairly. Participants also improve their understanding of development issues and other stakeholders concerns. Workshop activities may include brainstorming, concept mapping, and participatory modeling.
- *Task forces* are stakeholder committees that typically meet multiple times over weeks or months to accomplish a task. Usually the task is larger and more complex than the tasks addressed in workshops. For example, planners have asked task forces to develop proposals that take into consideration multiple stakeholder interests. Completing this task may require task force members to gather information about development impacts, reach consensus on goals and objectives, study actions that could help to achieve these goals and objectives, and recommend a particular set of actions.
- *Large group planning processes* encourage direct dialogue and interaction among many different stakeholders. One example is the search conference, typically a multi-day planning event involving 25–75 stakeholders, in which participants collectively envision and plan for a desirable future. This method promotes the shared construction of knowledge, open dialogue, and democratic decision making. Planning a search conference and following up afterward requires substantial time and may be best implemented with the assistance of professional facilitators.

These techniques can be used in isolation or can be combined to develop a comprehensive strategy for constructive stakeholder engagement. The case studies described below illustrate how some of these techniques have been applied to tourism planning and development in the USA.

Case Study 1: Participatory Modeling Workshops

Engaging stakeholders in tourism planning and development can take many forms. One example is participatory computer modeling, a powerful tool to reconcile contrasting points of view, increase shared understanding, and resolve conflicts (van den Belt 2004). Participatory modeling involves a community in the process of collectively building a model to address a particular situation affecting their lives. One of the most important aspects of modeling as a consensus-building tool is the process of its development, setting a stage for stakeholders to work together, share world views, and hopefully come to a common understanding of their shared systems.

To assess the usefulness of participatory modeling for tourism planning and development in rural communities, key representatives involved in tourism and recreation were contacted in each of the four Northern Forest states (Maine, New Hampshire, Vermont, and New York) and asked to suggest communities that would be interested in such a study and to aid researchers in making contacts (Chase et al. 2010). Six communities were selected: the Village of Saranac Lake, New York; the Town of Wilmington, New York; the three-county region of the Northeast Kingdom, Vermont; Franklin and Grand Isle Counties, Vermont; the Town of Colebrook, New Hampshire; and the town of Carroll, New Hampshire. These communities were chosen based on the following criteria: population, status of tourism infrastructure, percentage of tourism revenues compared with other industries, and a community's level of interest in participating in the project. The final criterion was heavily weighted, as it was essential for voluntary participation by community members.

Working with key contacts, the researchers identified between 10 and 20 community representatives to take part in participatory modeling workshops. These representatives included hotel and motel owners, restaurant owners, shop owners, town employees including law enforcement and waste management, town trustees, local planning board representatives, outdoor recreation guides, members of environmental organizations, historical society members, farmers and other large landowners, as well as representatives from local Chambers of Commerce.

One-day workshops were then held in each community between October 2004 and October 2005. The goal of each workshop was to develop a scoping model, or visual diagram, representing the tourism and recreation industries unique to each community. The agenda for each workshop was the same. Community members were first asked to brainstorm about any and all aspects of tourism and recreation in their community. After generating lists of components and factors in the morning, ranging from septic systems and roads to concepts such as community trust, the afternoon became focused on building a model. The modeler, using STELLA software projected on a large screen, collaboratively defined the relationships and connections within the model. Although the initial focus of the workshop brainstorming was recreation and tourism, participants began discussing how development in these areas impacted the overall well-being of their community. Therefore, the model became centered around quality-of-life, with the recreation and tourism industries just one of the many impacting variables factored in the service sector (Morse 2007).

After the six workshops, researchers compared the models to assess the levels of similarity and dissimilarity between the six site-specific iterations. Each model was comprised of six prototypical sectors: quality of life, culture, nature, economics, service, and infrastructure. Four of the six models had one or two unique or missing sectors, but the Saranac and the Wilmington models had the prototypical complement of six sectors. All six of the models had a "quality-of-life" sector and a "natural resources" sector.

This led to the construction of a general model reconciling the similarities and differences of each of the six models. The general model was developed with three main components contributing services to the local economy (Fig. 28.3). These sections were identified as Cultural Outlooks,

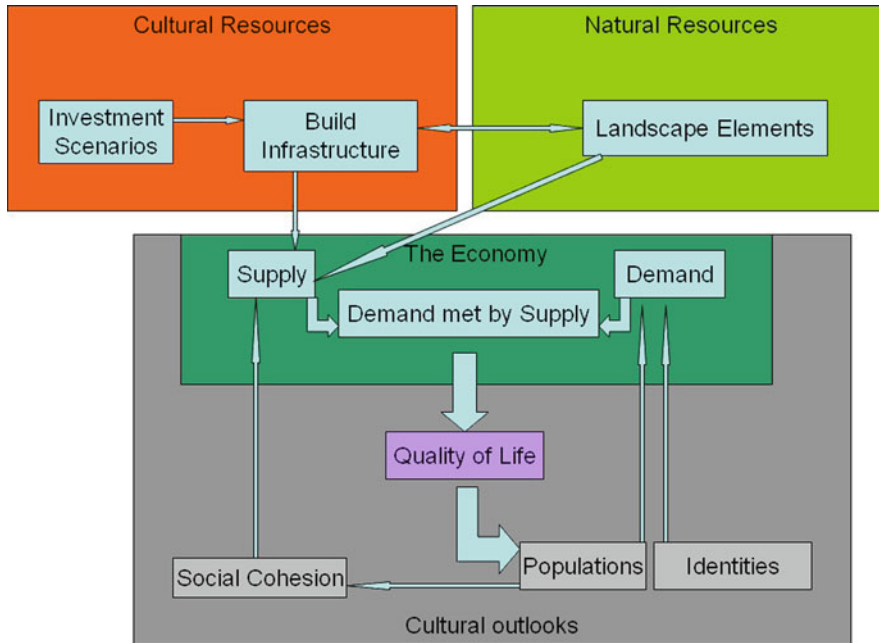


Fig. 28.3 General model developed with quality-of-life at the center

Cultural Resources, and Natural Resources, which together produce services identified by the participants including Social gatherings, Public services, Natural amenities, Summer recreation, Winter recreation, Spring recreation, Fall recreation, Housing, and Dining and lodging.

The quality-of-life (QOL) sector was the main, unifying section of the general model. This variable is composed of Positive Contributions to QOL and Negative Contributions to QOL. The Negative Contributions are made up of Unmet Services. Positive Contributions to quality-of-life are made up of two main factors: Local Jobs and Small Town Feel. Small Town Feel, a concept of great importance to most communities, was seen as being a result of a low level of Landscape Mismatch and a high level of Safety. Each variable of this sector is defined below (Morse 2007):

- *Resident Jobs* is an array of *Residents* and is calculated as an array sum of *Local Jobs* summed for each *Resident* group.
- *Jobs on Quality of life* is an array of *Residents* and establishes a level of importance of jobs to each *Resident* group.
- *Effect of Landscape Mismatch on Small Town Feel* is one value that determines the significance of *Landscape Mismatch* on the *Small Town Feel*.
- *Effect of Safety on Small Town Feel* is one value that determines the significance of *Safety* on the *Small Town Feel*.
- *Small Town Feel* is calculated as *Safety* raised to the value of the *Effect of Safety on Small Town Feel* divided by the *Landscape Mismatch* raised to the value of the *Effect of the Landscape Mismatch on Small Town Feel*.
- *Small Town Feel on Quality of life* is an array of *Residents* that determines the significance (between 0 and 1) of *Small Town Feel* on the *Quality-of-life* for each *Resident* group.
- *Positive Contributions to Quality of life* is an array of *Residents* as *Resident Jobs* raised to the value of *Jobs on Quality-of-life* multiplied by the *Small Town Feel* raised to the value of *Small Town Feel on Quality of life*.

- *Unmet Service Impact on Quality of life* is a two-dimensional array of *Services* and *Residents* that determines the significance (between 0 and 1) of *Unmet Services* on each *Resident* group's *Quality of life*.
- *Negative Contributions to Quality of life* is an array of *Residents* summing up the values of *Unmet Services Impact on Quality of life* for each *Service*.
- *Quality of life* is an array of *Residents* calculated as *Positive Contributions to Quality of life* minus *Negative Contributions to Quality of life*.

Quality of life was initially given different names in the six communities ranging from “happiness of residents” in the Northeast Kingdom to “quality-of-life” in most of the other locations. In one community, the central concept was initially termed “money.” The variable gradually changed to “quality of life” as participants voiced the many other aspect of their lives that they valued. Once participants began talking about what they really wanted, they inevitably began defining their quality of life, and all of the different components that impacted it.

The form of the model suggests that participants developed a deeper understanding of the linkages of recreation and tourism with quality-of-life and rural community development. What started out as a brainstorming activity to generate all aspects and components of recreation and tourism became a discussion of quality of life in all six workshops. During the discussions, participants had difficulty isolating recreation and tourism components; these issues pervaded all aspects of their lives. This idea was reflected in the shape of the model, which became centered around quality-of-life, with the economy and tourism and recreation industries being one part of a much bigger picture. The concept of quality of life as the central goal was consistent throughout the six locations. Enabling community members to come to this realization jointly illustrates the power of stakeholder engagement as a method for understanding the interactional effects of recreation and tourism and the relevance of quality of life to residents of host communities.

Case Study 2: Trainings and Technical Assistance

The previous example described a participatory modeling project designed to engage a broad range of community members without regard to occupation. In contrast, this example describes an attempt to reach out to a specific cluster of community stakeholders based on occupation. This case study is an example of responsive stakeholder engagement – the development of an outreach project based on a demonstrated need emerging from community-based informational workshops. Specifically, this project engaged farmers in issues of risk management arising from agritourism, tourism planning, and development on farms. These issues included discussions of investments in infrastructure, business development, contractual arrangements with vendors, statutory compliance, and environmental issues.

Agritourism is defined broadly as tourism activities taking place either on a farm or related to some agricultural context. Agritourism is important to quality of life for economic reasons. In Vermont alone, agritourism added \$10.5 million to statewide farm income in 2001, an average of \$5,000 per farm (Aldous 2001). New Hampshire's agricultural tourists spent an estimated \$201 million in 2002, including \$26 million for farm products. This spending resulted in 2,556 full-time equivalent jobs, household incomes of \$59.2 million, and \$19.2 million in state and local government revenues (Goss 2003). Agritourism also contributes to quality of life in cultural ways, promoting experiential education, preserving traditional land use, and contributing to a rural sense of place.

In 2008 and 2009, university extension faculty in Vermont and New Hampshire engaged in grant-funded work to facilitate the development of agritourism throughout the region. The work

entailed a series of trainings designed to both acquaint farmers with a wide variety of agritourism issues and provide technical support as they began to engage in agritourism. The target audience was small and medium farmers, rural landowners, and other land-based entrepreneurs who were currently involved in, or were planning to start, agritourism enterprises. Typical participants were young farmers new to farming and agritourism as well as mid-career farmers with advanced involvement and experience seeking to expand their agritourism operations.

While these trainings were highly successful, participating farmers unequivocally stated the need for additional efforts to be directly focused on risk management education. In other words, the farmers who were engaged (or were thinking of being engaged) in agritourism were concerned with specific risk issues involving infrastructure investment, business and strategic planning, liability, and insurance. As a result, an additional outreach project was designed that consisted of the development and execution of a new training during which farmers, with the help of facilitators and risk management experts, created their own personalized risk management plan. In addition, farmers were eligible to receive follow-up technical assistance during the implementation of their plans, including evaluation of the implementation process to document “lessons learned” and ensure continued impact of the risk management program. Participation in the trainings was driven by a desire among farmers to reap the benefits of agritourism while ensuring the safety and well-being of visitors and assuring a measure of protection for their farms and employees.

Approximately 65 farmers participated in the risk education trainings. These farmers became familiar with issues of risk management, received information and materials, and participated in the creation of a local network of farmers, experts, and community members. In addition, 20 farmers were recruited to receive technical assistance as they implemented their personalized risk management plan from the workshop. Together, farmers and project leaders monitored the success of those risk management plans in the months following implementation.

The primary educational tool used at the trainings was the experiences and perspectives of risk management experts. Presenters included insurance agents, lawyers, tax professionals, local extension agents, and other farmers who successfully navigated the challenges of risk management in agritourism. These individuals were chosen both for their familiarity with risk management issues and their experience working with farmers and other producers. In addition, representatives from state agencies such as the Vermont Agency of Agriculture and the New Hampshire Department of Agriculture, Markets and Food were on hand to explain regulatory requirements at the state and local level. In addition to sharing their expertise at the seminar, several experts were asked to contribute to the development of curriculum materials in advance of the seminar. These materials included worksheets, risk awareness profiles, manuals, and templates.

By participating in this project, agritourism farmers were better able to manage their personal and business liability in three ways. First, the risk education trainings and the follow-up technical support provided farmers with direct access to insurance experts. This exposure helped farmers manage personal and business liability by providing them with up-to-date information, best practices, and future directions in agritourism insurance. Second, farmers had direct access to lawyers, tax planners, and other financial experts. This access helped farmers better manage risks associated with investments in infrastructure by familiarizing them with the structure of business development, contractual arrangements with vendors, statutory compliance, and environmental issues. Finally, the risk education trainings and the follow-up technical support helped farmers develop networks and relationships with stakeholders including the general public, local governments, and other farmers. This helped farmers manage risks associated with strategic planning by providing them with access to others who have successfully navigated the challenges of agritourism in their local areas or on their own farms.

In terms of quality of life, these trainings demonstrate three key components of stakeholder engagement. First, the trainings were a direct response to an identified need. Second, the trainings

featured direct involvement in the issues and decision making that influence farmers' quality-of-life. Through the hands-on creation of a personalized risk management plan, farmers were both personally involved with the creation of policy and the creation of networked connections relating to risk management. This process closely mirrors the construction of social capital (Crawford et al. 2008). Finally, the trainings contribute to the quality of life of residents of rural communities, better positioning farmers to create agritourism ventures that informally contribute to positive farm/neighbor relationships and formally align with community planning structures.

Case Study 3: Surveys and Focus Groups

Land tenure changes, globalization of the timber industry, growing recreational demand, and new conservation easements are all contributing to the changing landscape of the Northern Forest region in the Northeastern USA. To effectively cope, adapt, and plan, rural communities throughout the Northern Forest have found themselves seeking to understand how social and economic forces are affecting rural development prospects, and ultimately quality of life, particularly with respect to tourism and recreation on private lands. To respond to this change, researchers in the four states included in the Northern Forest (Maine, New Hampshire, Vermont, and New York) conducted research in 2008 on land tenure changes and access trends, collecting primary data on landowners' attitudes and behaviors related to access, easements, and secondary income. This case study describes this research, emphasizing the involvement of key stakeholder groups and relevance for quality of life.

The overarching goal of the research was to improve understanding of the social and economic forces affecting tourism and recreation on private lands in the Northern Forest and gain an improved understanding of the implications for quality of life. This information is an essential component of regional planning for economic stability, environmental sustainability, and community vitality in an environment of change. To accomplish this goal, surveys were conducted and focus groups were convened.

A series of surveys were designed to gather input from private landowners, industrial and institutional landowners, and large investment landowners with parcels greater than 10,000 acres. The surveys probed individual attitudes and institutional policy toward current land uses, recreational uses, access and/or posting, entrepreneurial opportunities, fees for different types of recreation, land subdivision, land-use conversion, alternative methods of landowner compensation, tourism development, management partnerships, and rural development strategies. The private landowner survey, conducted by mail, sampled 600 landowners from each state who were Northern Forest residents and who owned parcels of 10 acres or more. The institutional survey sampled two landowners (one industrial and one institutional) from each of the 24 towns selected in the private landowner survey. This questionnaire was conducted via telephone and was designed to assess corporate or institutional policy regarding land use and access for recreation. Finally, the large investment landowner survey selected respondents on a state-by-state basis. These landowners were those whose influence on the region is felt by the sheer size of their holding, and were interviewed by phone or face to face. In sum, the data collected from these three groups allowed researchers to assess the scope of land tenure change throughout the Northern Forest, devise a predictive model for access and/or land posting, and understand land use alternatives in a changing rural landscape.

To share findings and better understand implications for quality of life, a series of focus groups were collaboratively organized. Focus group participants included landowners, natural resource agencies, non-governmental organizations, tourism and recreation interests, state legislators, town planners and elected officials, and regional and local chambers of commerce. At the focus groups, researchers presented findings and facilitated discussion among participants

about policy recommendations, entrepreneurial recreation and tourism activities, alternatives to fee-based incentives, and innovative collaborations that could conserve private lands and resolve access issues while respecting local traditions.

This project illustrates how stakeholder engagement can create outcomes that directly impact the quality of life of local residents. The focus groups resulted in creation of broadly supported strategies for private lands conservation and access policies in the four Northern Forest states. This included an inventory of actual and potential recreation and tourism development opportunities, alternatives to fee-based incentives for recreational access, and innovative partnerships working to resolve private lands conservation and access issues. As a result of this work, communities and landowners became better informed about the opportunities and challenges related to recreation and tourism on private lands and the implications for quality of life of residents of host communities.

Challenges of Stakeholder Engagement

Engaging the diverse sets of stakeholders involved in tourism and community development is often a difficult task. To be successful, managers and policy-makers must overcome a series of challenges to consistently develop the trust of each and every stakeholder in the policy arena. Put simply, people's opinions matter, and the development of trust lies in ensuring that opinions are heard and processed. While not every stakeholder will be satisfied with the outcome of the policy process each and every time, they must be satisfied with the process itself. Below are some common challenges to successful stakeholder engagement.

Resistance among stakeholder sets. In some situations, participants in the policy process may be reluctant to even be at the table. Occasionally, there is distrust and animosity between various groups of stakeholders, with an "us versus them" mentality defining the proceedings. This stems in part from traditional forms of policy development in which dominant groups (specifically, interest groups, business, and government) attempted to maintain power, creating fragmentation. Planners must challenge this traditional linear approach and begin to embrace strategies which both foster democracy and extend traditional boundaries.

Ensuring equity and fairness. Fairness and equity in the public participation process ties closely to Bozeman's concept of Brokerism, a philosophy founded upon "widespread access to the policy-making apparatus" which in turn acts as a sort of glue, holding together various societal interests (Bozeman 1979). Smith and McDonough (2001), however, have found that while stakeholders often receive access to this policy apparatus, they do not always feel fully involved, and, in some cases, they even feel disrespected. While this dissatisfaction alone does not suggest the failure of policy strategies such as Brokerism, it illuminates a potential pitfall – the governmental glue holding society together needs to incorporate methodologies which people view as fair and effective.

Problematic relationships among institutions. Input from private and public institutions is critical to managing stakeholder relationships. Clarke and McCool (1996) describe the unpredictability and uncertainty that trouble a number of federal agencies, who have "muddled through" their long and complicated histories. According to Clarke and McCool, much of this difficulty stems from the fact that institutions are often facing independent and oftentimes conflicting goals. Planners, therefore, should consider not only the bureaucratic underpinnings of the institutions with whom they work, but also the history of the organization.

Communication issues. Communicating with stakeholders has never been more complex. The emergence of social media and Internet-based tools such as Facebook and Twitter provide a wide array of both opportunities and pitfalls. In addition, research shows that traditional use of the Internet is changing – not only is material presented differently, but the ways in which we physically view web pages is changing as well. The complexity of modern communications can be a challenge, but it can also provide opportunities for effectively communicating with stakeholders.

Lack of time and money. Engaging stakeholders can be expensive depending on the techniques selected. Unfortunately, even though the usage of parks, recreation facilities, and other public resources that enhance quality of life has increased, the percentage of the total budget being met by public funding has substantially decreased. As a result, planners are forced to choose between scaling back services or finding new sources of funding (Van Sickle and Eagles 1998). Stakeholder engagement may require creative manipulation of existing budgetary processes. For example, the adoption and implementation of new strategies regarding staffing levels, budgetary discretion, and reporting requirements can be employed to secure a place at the planner's meager financial table (Rubin 1996).

Difficulty defining and measuring quality of life. Reliability and validity are critical to any quantitative measures of QOL. While the term “reliability” refers to the consistency and dependability of research data, “validity” is defined as the degree to which an indicator of a particular construct represents the true, actual essence of that construct (Babbie 1998; Fisher and Foreit 2002; Singleton and Straits 2005). Planners considering creating their own personal indicators of quality of life are encouraged to consult with experienced research designers to ensure the reliability and validity of their proposed measures.

Summary and Guidelines

Challenges notwithstanding, stakeholder engagement is widely accepted as a key to improving quality of life of residents of host communities.

Planners or developers seeking to engage stakeholders should:

1. Identify important stakes
2. Be inclusive
3. Consider using multiple techniques for incorporating stakeholder input
4. Encourage constructive deliberation and understanding
5. Find ways to balance competing interests

Numerous techniques ranging from surveys to focus groups to trainings can be utilized to engage stakeholders. These techniques can be used in isolation or combined to develop a comprehensive strategy for stakeholder engagement.

Challenges to engaging stakeholders include:

1. Resistance from some stakeholders
2. Ensuring equity and fairness
3. Problematic relationships among institutions
4. Communication issues
5. Lack of time and money
6. Difficulty defining and measuring quality of life

This last challenge is currently being addressed by researchers working closely with practitioners to expand the body of knowledge and practical tools available for assessing quality-of-life indicators for individuals, families, and communities. As stakeholder engagement in tourism planning and development increases in importance and acceptance throughout the world, so too does the need for quality-of-life indicators to measure successes and challenges for residents of host communities.

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Chapter 29

Destination Competitiveness and Its Implications for Host-Community QOL

Geoffrey I. Crouch and J.R. Brent Ritchie

Introduction

The body of literature broadly covering the “impacts of tourism” has clearly demonstrated the many and varied beneficial and harmful effects that can arise from tourism activity. Selected examples from the literature include Allen et al. (1988), Allen et al. (1993), Andereck et al. (2007), Ap (1992), Harrill (2004), Johnson et al. (1994), King et al. (1993), Mason and Cheyne (2000), Perdue et al. (1987), and Tosun (2002). To a significant extent, many of these positive and negative impacts are perceived and experienced by the relevant host community. In response, host communities may actively seek to facilitate and encourage the “positive” impacts while endeavoring also to limit or mitigate any “negative” impacts. In reality, the vast majority of communities regard the net impacts of tourism activity as being overwhelmingly positive. This is evident in the fact that the majority of communities actively seek to encourage tourism visitation and development (Perdue et al. 1990). In some cases, efforts are made to limit or control tourism in order to avoid or cap undesirable outcomes. But rarely is tourism activity per se regarded as unwelcome.

Efforts by host communities to encourage tourism take many forms. Government departments or semi-government agencies are charged with the task of facilitating tourism development and devising tourism promotional programs. Governments spend tax dollars on tourism infrastructure and superstructure in order to provide a public foundation for private sector investment in tourism. Bids are prepared and often many public dollars are spent in efforts to compete for major events which have the potential to attract large numbers of visitors. Communities typically display great civic pride when hosting visitors.

Through these behaviors, it is evident that many host communities wish to compete for a share of the tourism market because, in doing so, it is expected that the benefits for residents will be substantial, leading to an overall enhancement in their quality-of-life. In order to compete,

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host communities need to develop competitive tourism products and experiences. The public sector needs to work in concert to ensure that tourism planning, implementation, and development occur smoothly toward the achievement of particular goals (Ap and Crompton 1993; Jurowski et al. 1997). They also need to create an environment which encourages the private sector to invest in tourism in such a way that the right mix of development occurs, maximizing community benefits and avoiding undesirable outcomes.

If a host community wishes somehow to “optimize” the set of tourism impacts, this implies pursuing a deliberate, goal-driven strategy. Determining what these goals should be is therefore a critical step and prerequisite to the development of a tourism strategy. But before specific goals are set, a decision needs to be made, either implicitly or explicitly, as to who are the relevant stakeholders. When a narrow view of stakeholders is adopted, there is the potential to advantage some people while disadvantaging others. However, if the entire host community is seen to encompass the relevant stakeholders, it is more likely that any deliberate tourism development strategy will be formulated with QOL as a central principle (Dissart and Deller 2000; Massam 2002).

The capability of a host community to seek to benefit from tourism activity then depends on the attributes which will enable it to achieve the QOL goals which it wishes to accomplish. Although tourism activity in a host community consists of accommodation and food services, sightseeing and tours, transportation, cultural activities, etc., the real product which a host community has to offer in a global tourism market is the total “experience” of the destination. The “competitiveness” of the host destination therefore embodies the community’s potential to reach the QOL goals it seeks to attain.

Host destinations vary considerably in terms of their intrinsic, endowed attractiveness as well as their ability to deploy tourism resources and capacities. The host communities at these destinations may also vary significantly with regard to their values, attitudes, desired lifestyles, and ambitions. Thus, what defines quality-of-life for one community may be rejected by other communities. As a result, different host destinations will seek different outcomes depending on what they want, and what resources they are able to deploy in order to get what they want. A destination’s competitiveness, therefore, must be assessed in light of both of these factors.

In this chapter, we therefore explore the importance of destination competitiveness to the improvement and attainment of host-community QOL. In the next section we examine host-community QOL objectives and the link to destination competitiveness in detail. Here we discuss how host communities might go about deciding what outcomes they seek and what consequences they may wish to avoid. In the next section we then turn to destination competitiveness in detail in order to identify how a destination may evaluate and enhance its competitive position so that it is in the best position to attain those objectives. We then discuss the practical application of destination competitiveness theory by host communities as well as the research challenges which can help to inform further understanding.

Host-Community QOL Objectives and Destination Competitiveness

As a first step in efforts to ensure that destination competitiveness development initiatives are consistent with the QOL objectives that residents of a destination wish to see realized with the help of tourism, it is essential to reach a consensus as to which QOL goals are truly important to residents.

A review of the literature on QOL reveals that there are a variety of appropriate, and supportive, measurement tools, which have been developed by different individuals and organizations. Despite the large number of different approaches, there appears to be, perhaps understandably, a limited number of underlying dimensions that capture the essence of the QOL concept. Accordingly, in

Table 29.1 Basic QOL measures from selected studies

Study	Basic measures
UNDP HDI	Life expectancy, Knowledge level, Standard of Living [3 major dimensions, each of which involved a number of supporting measures]
Andereck and Gyan (2011)	Physiological needs, security, belongings, self-esteem (social capital, human capital, physical capital, financial capital, natural capital)
Spiers and Walker (2008)	Overall life satisfaction, standard of living, personal health, personal safety, community connectedness, future security, spirituality/religion
Calvert Henderson (2000)	Employment, energy, environment, health, human rights, income, national security, re-creation, shelter, education, infrastructure, public safety
Diener (2006)	<p>Subjectivity well-being: refers to all the various types of evaluation, both positive and negative, that people make of their lives. Positive affect denotes pleasant moods and emotions, such as joy, affection, contentment, pleasure, euphoria</p> <p>Negative affect includes moods and emotions that are unpleasant, and represent negative responses people experience in relation to their lives, health, events and circumstances (e.g. anger, anxiety, worry, stress, frustration, guilt, shame, envy)</p> <p>Life satisfaction represents a report of how a respondent evaluates or appraises his or her life, taken as a whole. The term, life, can be defined as all areas of a person's life at a particular point in time – or as an integrative judgment about the person's life, since birth</p> <p>Domain satisfactions are judgments people make in evaluating major life domains such as: physical and mental health, work, leisure, social relationships, family</p> <p>Quality-of-life usually refers to the degree to which a person's life is desirable versus undesirable, often with an emphasis on external components such as environmental factors and income</p>
Diener and Suh (1997)	Discuss how quality-of-life is defined broadly so as to include not only quality-of-life circumstance, but also the person's perceptions, thoughts, feelings and reactions to those circumstances. Indices that combine objective and subjective measures have also been proposed
Karnitis (2006) [QOL as Development Goal for Latvia]	Education, creativity, employment, households and family, social security, societal cohesion, democracy, lawfulness, internal security, human rights, modernization of governance, good foreign relations, openness to knowledge, inclusion in processes, stability of growth, leisure time, Latvian language, lifelong health, environmental profile
Lloyd and Auld (2002) [Leisure as Determinant of QOL]	Social indicators, attitudes of participates, frequency of participation, value of natural leisure spaces, public culture, leisure satisfaction, resource usage, perception of environmental quality, overall life satisfaction

our treatment of the topic, we shall selectively focus on a limited number of specific approaches that we believe capture a sufficient number of the most relevant elements of the QOL concept for purposes of the present discussion. The approaches we have selected for discussion here, and their most essential elements, are summarized in Table 29.1.

UNDP Human Development Index

With respect to destination competitiveness, perhaps one of the most widely recognized QOL indices is the Human Development Index (HDI) prepared by the United Nations Development Program (UNDP) within the framework of its annual Human Development Reports (HDR) (UNDP 2007).

The HDI is a composite index which brings together measures of a country's resident well-being, which is captured by three main dimensions of well-being: a long and healthy life (life expectancy), level of knowledge (education), and standard of living (GDP per capita).

These three main dimensions of the HDI, while seemingly straight forward, do contain considerable complexity and detail regarding the well-being of the resident populations they describe. For example, the educational level for the country is comprised of adult literacy rates and the combined gross enrolment rates for primary, secondary, and tertiary schooling, weighted to give adult literacy more significance. The life expectancy component of the HDI is similarly complex in its calculation, as is the index of economic well-being. What is important about this complexity is that while it is intended to allow cross-country comparisons, it is also intended to reflect country-specific priorities and problems. Both of the above points should be kept clearly in mind when we attempt to identify measures of QOL that we feel may be helpful in our efforts to understand what aspects of QOL are most likely to enhance or detract from our aim to improve the competitiveness of a tourism destination. Conversely, we need to ensure that we understand as fully as possible the nature and extent to which our efforts to improve a tourism destination's competitiveness may impact upon those aspects of QOL which are of greatest importance to the residents of that destination.

Objective Versus Subjective Measures of QOL

The reader will note that each of the three areas indexed in the HDI involves measures which are objective in nature; that is, the measure focuses from a perspective that is objective and external to the residents of a country (or tourism destination). The great advantage of these objective/external measures is that the data collection can be standardized – and as such, is relatively easy and results can be readily compared across countries/destinations. Despite these practical advantages, it is argued that social indicators and subjective well-being measures are necessary to fully and effectively evaluate a society and to add substantially to the regnant economic indicators that are now favored by policy makers. Furthermore, each of the two approaches to measuring the quality-of-life (objective and subjective) contains information that is not contained in the other measures (Diener and Suh 1997).

In order to implement a subjective dimension of QOL measurement, Diener and Suh outline a framework containing three philosophical approaches to determine the quality-of-life. The first approach describes characteristics of the good life that are detailed by normative ideals based on religious, philosophical, or other systems. The second approach to defining the good life is based on satisfaction – the assumption being that people will select those things that will most enhance their quality-of-life. Finally, and of particular relevance to tourism, is Diener and Suh's third approach to QOL which is expressed in terms of the experiences of individuals. If a person experiences their life as good and desirable, it is assumed to be so. In this approach, factors such as feelings of joy, pleasure, contentment, and life satisfaction are paramount. Obviously, this approach is highly associated with the subjective well-being tradition of the behavioral sciences (Diener and Suh 1997, p. 90).

The Choice of QOL Indicators for Destination Competitiveness Analysis

The foregoing discussion has provided an overview understanding of the type and range of QOL indicators that exist and that have been used by others to meet their specific needs. While more

Table 29.2 Selected set of QOL measures for use in destination competitiveness policy development

Measure	Nature	Source
Income		
Employment		
Health		
Longevity		
Safety		
Standard of living		
Infrastructure (extent and quality)		
Leisure facilities		
Enjoyment		
Environmental quality		
Life satisfaction		
Freedom from anxiety, stress		
Social relationships		
Family relationships		
Creativity		

extensive research might result in more definitive guidance as to which specific QOL measures are most appropriate for destination competitiveness (DC) analysis, the present authors do not possess the luxury of waiting for the findings of such research. Accordingly, in order to derive the greatest benefit from available information for the present purpose, we still select a representative set of available QOL measures which balance the objective/subjective sides of the debate. The measures which we have selected are provided in Table 29.2.

Integrating Host-Community QOL Objectives and Tourism Destination Competitiveness Goals

This section of the chapter examines the challenges faced by both community leaders and destination managers as they seek to enhance resident well-being (QOL) by integrating tourism destination development strategies (which are designed to provide tourists with high-quality visitation experiences) with community initiatives that seek to enhance resident QOL. As Fig. 29.1 illustrates graphically, the above process is effectively one which attempts to fully integrate the permanent well-being of destination stakeholders (residents) with the temporary quality experiences of non-destination stakeholders (visitors). We assert that when a stable equilibrium between both sides of the equation is reached and maintained that a successful policy outcome has been achieved. From a conceptual perspective, we identify the process as the formulation and satisfaction of the “Destination Policy Equation.” Furthermore, it is our hypothesis that it is when, and only when, this equation is satisfied – and in a state of equilibrium – that a truly sustainable competitive destination has been established. Accordingly, we now turn to an examination and discussion of the variables that constitute the competitive/sustainable destination policy equation (C/S DPE).

As can be seen from Fig. 29.1, the overall integrative policy goal (IPG) involves seeking to merge the left-hand side of the visual equation labeled as “Destination Resident Quality-of-Life” (DRQOL), and a right-hand side of the equation which is labeled as “Destination Visitor Quality of Experience” (DVQOE). As Fig. 29.1 also seeks to demonstrate, it is the joint responsibility of the Destination Management Organization (DMO) and the Community Development Organization (CDO) to balance the various components of the DRQOL and QDVE so as to ensure that the well-being of residents and visitors is managed in a way that reflects the rights and resources of

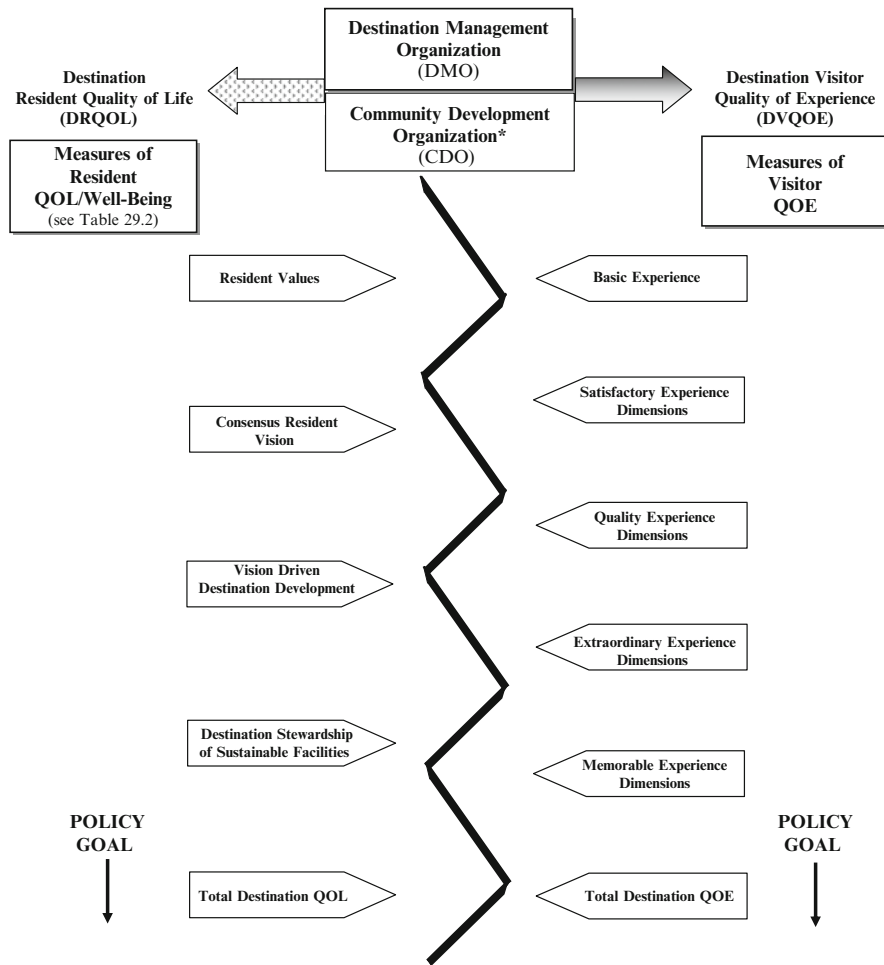


Fig. 29.1 Integrative policy goal framework: relating resident QOL goals and visitor quality experience objectives (*NOTE: The CDO functions may be performed by either a formal community organization or by a collection of community oriented individuals) (Source: Sheehan and Ritchie (2005, p. 721))

each of these major stakeholder groups. This section of the chapter now addresses in detail the identity and relative importance (salience) of the specific stakeholders, in each stakeholder group – as well as the challenges which face DMO and CDO managers as they attempt to merge and balance the interests of each stakeholder group and its constituent members.

Identifying Resident Stakeholders

Freeman, in his seminal work (1984, p. vi) defined a stakeholder as “any group or individual who can affect, or is affected by the achievement of a corporation’s purpose.” Adapting this broad definition of a stakeholder to the context of the tourism destination, we define a destination resident stakeholder (DRS) as any group or individual who can affect or is affected by the achievement of

Table 29.3 The three most salient DMO stakeholders

Stakeholder	Most salient			Total	Percent ^a
	#1	#2	#3		
Hotels/Hotel Association	29	20	8	57	62.6
City/Local Government	35	12	8	55	60.4
Regional/County Government	12	6	9	27	29.7
Attractions/Attraction Association	1	9	8	18	19.8
State/Provincial Tourism Department	4	9	5	18	19.8
Members		9	2	11	12.1
Board of Directors/Advisory Board	5	3	2	10	11.0
Convention Centre/Banquet Facilities		5	3	8	8.8
Community/Citizens/Residents	2	1	2	5	5.5
Restaurants/Restaurant Association		2	3	5	5.5
Chamber of Commerce		2	9	4	4.4
University/College		1	3	4	4.4
Local Economic Development Authority		1	2	3	3.3
Sponsors	1	1	1	3	3.3
Airlines		1	1	2	2.2
Federal Government	1		1	2	2.2
Hospitality Industry		2		2	2.2
Media			2	2	2.2
Public facilities			2	2	2.2
Regional CVBs		1	1	2	2.2
Tourists	1		1	2	2.2
Advertising Agency			1	1	1.1
Arts/Arts Association			1	1	1.1
Destination Management Company			1	1	1.1
Meeting Planners			1	1	1.1
Non-Tourism Industry			1	1	1.1
Other Policy Makers in Area			1	1	1.1
Parks Department		1		1	1.1
Recreational			1	1	1.1
Retail Stores/Association			1	1	1.1
Travel Companies/Association			1	1	1.1
Volunteers			1	1	1.1
Other		2	3	5	5.5
Total responses	91	88	79	258	

Source: Sheehan and Ritchie (2005, p. 721)

^aCalculated by dividing the “Total” for each “Stakeholder” by the number of respondents (91). Illustrates the frequency and percentage of respondents identifying each as one of their three most salient stakeholders

the destination’s purpose. In addition, certain authors have found it useful to differentiate stakeholders either as primary or secondary. Clarkson (1998) has defined primary stakeholders as those who possess a “financial, official, or contractual” relationship with an organization/destination. Furthermore, the importance (or salience) of a particular stakeholder has been defined by Mitchell et al. (1997, p. 873) as being a function of power, urgency, and legitimacy. Based on the typology resulting from these three factors, the most salient stakeholder would have an urgent (time sensitive) claim against the destination, the power to enforce its will on the destination, and be perceived as legitimate in exercising its power.

Sheehan and Ritchie (2005) have applied the foregoing stakeholder theory framework specifically to an area of interest – the tourism destination. However, the resulting table of most salient stakeholders (see Table 29.3) does not specifically differentiate between resident

and nonresident stakeholders – although an examination of the contents of Table 29.3 reveals that certain categories of nonresident stakeholders, notably “tourists,” were specifically identified by respondents (the CEOs of North American DMOs) as being a salient category of stakeholders. In addition, a substantial number of other salient stakeholder groups would appear to possess both resident and nonresident status. Examples of such dual status stakeholders might be airlines, national, state/provincial government personnel, national/international retail firms, associations, and media to mention only a few. We highlight the dual status of residents since it will have to be addressed as we proceed to assess the impact of destination competitiveness on resident or nonresident well-being. Before we can proceed to make this assessment, it is essential to reemphasize the fundamental thesis of this chapter – namely that destination competitiveness is a complex, multifaceted concept, and that as a consequence, its effects on the host community are not just the obvious economic ones – but are also social, cultural, and environmental.

The Nature and Dimensions of Competitiveness

As the following section of the chapter makes clear, much has been written about the complex and important topic of competitiveness. For present purposes, we revert to our basic DC/S model (Fig. 29.2) in which the competitiveness of a destination is a measure of its ability to profitably attract and satisfy visitors – and in so doing, enhance the well-being of its resident stakeholders. This ability is determined by the extent and quantity of the destination’s “resource endowments” and by the effectiveness of its “resource deployment.” In turn, the extent and quality of a destination’s resource endowments are mutually a function of nature’s blessings; that is, its climate and scenery. Over time, these are complemented by the destination’s societal and cultural development, which can significantly enhance the resource endowment base – and thus, the destination’s tourism appeal and consequent competitiveness.

It is in the area of resource deployment, however, where the greatest opportunity for innovative and insightful policy initiative and management action lies.

Now that the nature of competitiveness for present purposes has been defined, we shall return to the topic of destination resident well-being (DRWB), with a view to clarifying the theoretical foundations of the measures that are appropriate to the understanding and monitoring of the well-being of destination residents.

Establishing Sustainable Destination Competitiveness: Merging Stakeholder Quality-of-Life with Visitor Enjoyment of Quality Experiences

Figure 29.1 provides a summary review of the theoretical dimension which, based on our DC/S model, we believe are the foundations of an integrated policy to develop tourism destination competitiveness while ensuring resident well-being/QOL. As shown, there are five such dimensions on each side of the policy equation which must be understood and merged. They are, on the resident side, resident values (RV), destination vision, destination development, and destination stewardship; and, on the visitor side of the equation, basic experience, satisfactory experience, quality experience, extraordinary experience, and memorable experience.

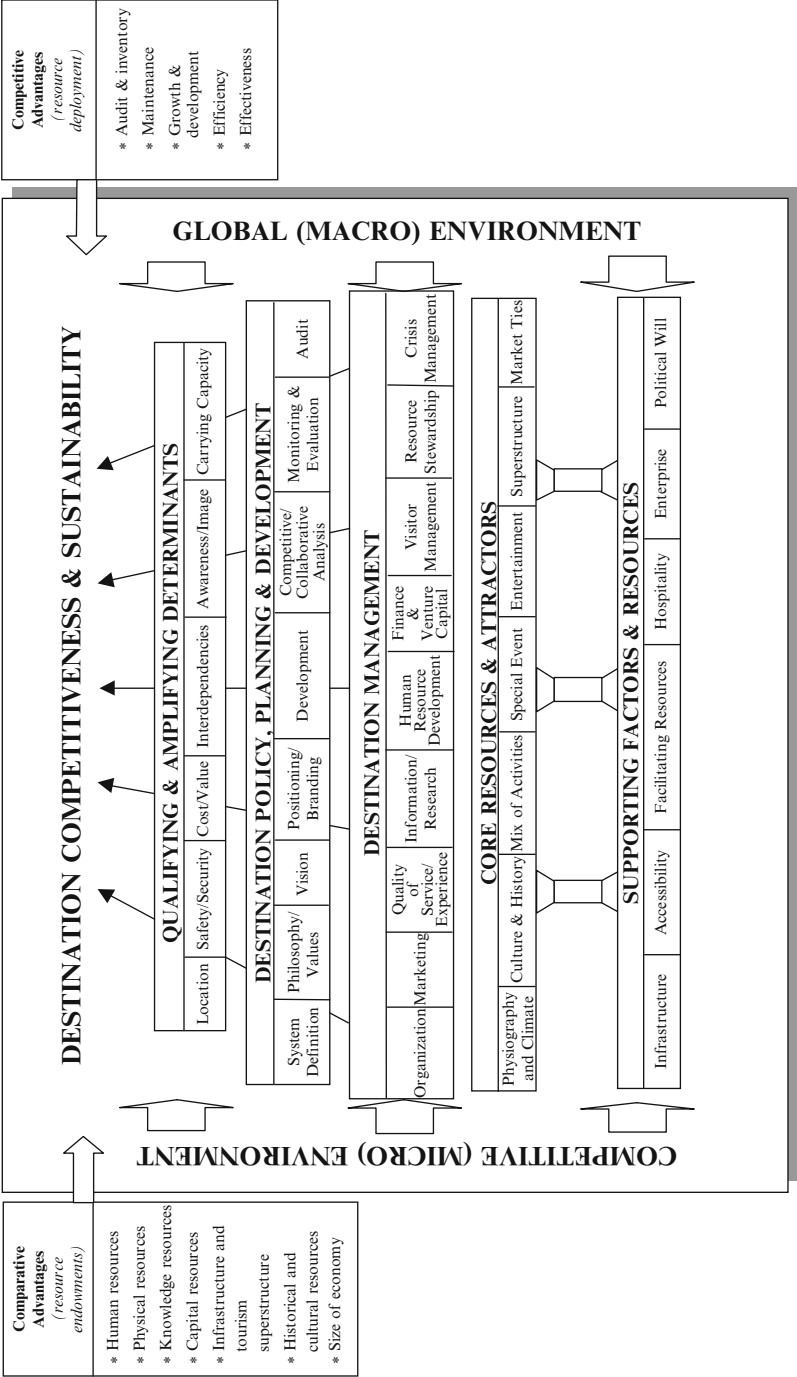


Fig. 29.2 Conceptual model of destination competitiveness (Source: Ritchie and Crouch 2003)

Resident Values: The Foundation of Desired Quality-of-Life

The premise of this discussion is that theoretically, sound resident quality-of-life (QOL) must be based on providing residents with items (things, experiences, etc.) that they truly value as components of their QOL. In brief, when seeking to formulate a consensus-based vision as to the kind of competitive tourism destination that residents would like to work toward through the destination development process, it is essential to know the nature of the underlying values that residents wish to satisfy as tourism policy makers and managers attempt to put in place the various components of their tourism development program.

The question which therefore must be addressed by policy makers and managers is how best to capture/measure the values which underlay the desired QOL variables.

While the literature on personal values contains several approaches to measuring personal values, there appears to be few, if any, scales for measuring resident values that are directly related to the kind of tourism destination and/or tourism development that they would like to see undertaken in their destination.

Measurement of Personal Values

While it may be desirable, in the long term, to develop a set of values measurement scales that more directly reflect/underlie the QOL that people desire [and as such input from readers, in this regard, would be more than welcome], for the moment, we propose that we content ourselves with the use of a widely accepted existing measurement scale – one that has been used in many different contexts. Since residents are simply “people,” it follows that any “generic” scale designed to measure personal values should have some relevance to the measurement of resident values. In this regard, the “Rokeach Value System,” developed by psychologist Milton Rokeach, has had a long and widespread acceptance for the measurement of individual values. The Rokeach Value System, (Rokeach 1968) is operationalized via the Rokeach Value Survey (Rokeach 1973). Specifically, it consists of two sets of values, with each set containing 18 individual value items. One set is called terminal values and the other is called *instrumental values*.

Terminal values refer to desirable end states of existence. These are the goals that a person would like to achieve during his or her lifetime. These values vary among different groups of people in different cultures. The terminal values are true friendship, mature love, self-respect, happiness, inner harmony, equality, freedom, pleasure, social recognition, wisdom, salvation, family security, national security, a sense of accomplishment, a world of beauty, a world at peace, a comfortable life, and an exciting life.

Instrumental Values refer to preferable modes of behavior. These preferable modes of behavior are means of achieving the terminal values. The instrumental values are cheerful, ambitious, loving, clean, self-controlled, capable, courageous, polite, honest, imaginative, independent, intellectual, broad-minded, logical, obedient, helpful, responsible, and forgiving.

When attempting to transfer the generic Rokeach Value System to the context of tourism destination residents, it seems logical that terminal values held by a resident might correlate with the dimensions of a vision statement describing the kind of destination a resident would ideally like to see developed over the long term. Similarly, the instrumental values held by a resident might correlate with the kind of behaviors the resident would like to see endorsed and demonstrated by both residents in the destination and all tourism personnel of the destination – and perhaps optimistically, by visitors as well.

Formulation of a Consensus-Based Destination Vision

Once the resident value set has been established, it provides a foundation for crafting a consensus-based destination vision. This vision provides a statement concerning the kind of destination that residents would like to see some 10, 20, 50 years into the future. Ritchie (1993) has outlined a formal process for crafting such a vision.

Translating the Vision into Reality: Destination Development

Once the value-based destination vision has been agreed upon by residents, the policy process must now move from planning into action. Such action takes the form of development initiatives designed to provide the tourism facilities – events and programs which collectively see the vision, which was created in the minds of residents, translated into reality on the ground.

Ensuring a Sustainable Destination: The Role of Stewardship

Once the destination has been developed and is operating successfully, the CDO and DMO must work collaboratively to ensure that both residents and visitors care for the destination – if the integrative policy goal of a sustainable tourism destination is to become a long-term reality.

Integrating Visitor Quality of Experience Objectives and Tourism Destination Competitiveness

Actions to fulfill the objectives of the visitor side of the integrated policy equation involve ensuring the delivery of a series of increasingly demanding levels of experience quality and richness (see Fig. 29.1).

Basic Experience

The DMO must first ensure that it fulfills the primary obligation contained in the destination brand promise (IACVB 2005) – by delivering the basic experience conveyed by that promise.

Quality Experiences

In today's competitive marketplace, it is clearly not sufficient to meet the basic expectation of the visitor. The DMO must ensure that the next level of quality is delivered by providing something extra – such as the so-called WOW factor, or some other experience enhancement that ensures the visitor experience goes well beyond the basic brand promise. Readers who wish to truly understand the nature of the connection between tourism quality experiences and quality-of-life should explore the insights provided by Jennings and Nickerson (2006). As Uyzal pointed out (via his comment on the inside cover flap of their book), they have succeeded in bringing out the

essence and true meaning of engaging in tourism and leisure activity – and in so doing, have clarified the connection between tourism quality experience and quality-of-life – a connection that has always been implied and assumed (but not always understood!).

Extraordinary Experiences

We now reach the stage where simple WOW factor enhancement is not enough to be truly competitive. As the DMO moves toward the next level, it must seek to provide some form of experience enhancement which makes the visitor feel they have experienced something that is truly extraordinary – because of its uniqueness or its richness.

The Memorable Experiences

Finally, at this quality level, the DMO now seeks to strengthen the visitor's experience even further by enhancing it so that it becomes truly memorable. Once this stage has been achieved, the DMO and CDO have succeeded in both integrating and matching the benefits realized by residents and visitors. In brief, the policy goal of destination competitiveness has now been achieved by integrating quality visitor experiences and resident quality-of-life.

Destination Competitiveness Theory

To be “more competitive” means being in a stronger position, compared to others, to achieve some “thing.” A weight lifter builds muscle strength in order to lift heavier weights. A sprinter seeks to run faster in order to cross the finishing line before other competitors. These are simple examples for which competitiveness can be easily measured and judged. A football team, too, has a simple aim – to score more goals than the opposition. But the team's competitiveness depends on a wider range of factors. Strength and speed play a part but a larger number of physical and psychological skills, including “teamwork,” come into play in this instance. That “thing” then, for our purpose here, is the goal of maximizing *host-community quality-of-life*, and destination competitiveness is therefore defined by the host community's capacity to achieve that goal through its engagement in, and management of, tourism activity.

The first point to be noted about destination competitiveness is how much more complex and multidimensional are its goals as well as its attributes compared to the sporting examples above. In the previous section, we examined how a destination's host community might go about formulating QOL goals through tourism activity. If we are going to employ an understanding of destination competitiveness to facilitate the pursuit of such goals, then we need a way of conceptualizing destination competitiveness from a managerial perspective. We begin, therefore, by considering the foundations of competitiveness theory.

Theoretical Foundations of Competitiveness

We start from the perspective of economic theory. Tourism is substantially an economic phenomenon. However, economic theory, particularly in the past, has often been criticized for its tendency to overlook social and environmental impacts. Today economic theory is much

more attuned to these concerns as is evident in the “triple bottom line” approach (Department of the Environment and Heritage, Australia 2004) to economic management, as well as the notion of “social capital” (Field 2008) and “sustainability.” Hence, economic theory is a good place to start.

Adam Smith (1776) pioneered the economic understanding of competition in his classic work titled *“An Inquiry into the Nature and Causes of the Wealth of Nations.”* This work extolled the virtues of the free market which is guided by a so-called “invisible hand” to ensure that producers and buyers of goods compete by acting in their own self-interest to the benefit of society as a whole. Smith contended that a market economy was best able to meet the needs of consumers by efficiently allocating society’s resources. Low costs of production were the basis of this efficiency. Subsequently, in 1817, David Ricardo was able, through his theory of comparative advantage, to explain why some nations imported certain goods rather than produce them locally even though they may be the lowest-cost producer. This arises when the resources involved can be put to an even better use.

A place possessing trading advantages benefits in a number of ways. Industry is attracted to these places resulting in employment and wages. The increasing concentration of industry results in both infrastructural improvements and an increase in business-to-business alliances and relationships. These changes bring about improvements in living conditions and industrial productivity. If the place is a country, the demand for the country’s products boosts demand for, and therefore the value of, its currency as well. This enables the residents of the country to purchase a greater quantity of imported products. In total, competitiveness means jobs, wealth, improved living conditions, and an environment in which residents can prosper. (Ritchie and Crouch 2003, pp. 11–12)

In modern times, globalization has stimulated much interest in economic competition. Porter (1980, 1985, 1990) has done much to expand our understanding of competitiveness in the business world. The economic competitiveness of nations has been measured since 1989 by the International Institute for Management Development (IMD) which produces the IMD World Competitiveness Yearbook (IMD 2009). There has been much research (see Ritchie and Crouch 2003, for detailed discussion) which has sought to define, understand, and measure competitiveness, but differing perspectives and foci have resulted in a limited consensus.

The problem of international competitiveness has been defined in highly diverse ways. These definitions (and the proposed solutions to the problem) are partially inconsistent, and thoroughly confusing to most academics, politicians, policy makers, and business managers. There is good reason for this confusion. The collection of problems alluded to as “competitiveness” is genuinely complex. Disagreements frequently occur not only at the level of empirical effects and of policies, but also in the very definition of the problem. Well-intentioned and reasonable people find themselves talking at cross purposes; sometimes it almost seems they are addressing different subjects. (Spence and Hazard, 1988, p. xvii)

Until more recently, much of the research and literature on competitiveness has focused on goods rather than services. However, international trade in services, including most importantly international tourism, is today of major significance in the balance of trade for most nations. There is therefore greater interest in service sector competitiveness, and it is generally considered that international trade theories can be applied to understanding service competitiveness (Deardorff 1985; Richardson 1987; Riddle 1986). Nevertheless, the intangible, multi-faceted nature of services complicates an understanding of service sector competitiveness. Gray (1989) has suggested that “Instead of a general model of international trade into which international trade in services must be compressed, there is a need for a series of models for separately-identifiable categories of international trade” (p. 99). Feketekuty (1988, p. 249) has proposed that tourism “provides an excellent basis for starting work on trade in services for a number of reasons.”

Destination Competitiveness Research

Interest in researching competitiveness in a tourism context has gathered pace over the past 15 years. Some studies have sought to diagnose the competitiveness of particular destinations and to recommend improvements (Ahmed and Krohn 1990; Botha et al. 1999; Carmichael 2002; Chon and Mayer 1995; d’Hauteserre 2000; Dwyer et al. 2003; Enright and Newton 2004, 2005; Faulkner et al. 1999; Hudson et al. 2004; Kim and Dwyer 2003; Kozak 2003; Mazanec 1995; Papatheodorou 2002; Pearce 1997; Vengesai 2005). Particular aspects of destination competitiveness have been the subject of a number of other studies (Baker et al. 1996; Buhalis 2000; Chacko 1998; Dwyer et al. 2000a, b, c, 2001, 2002; Go and Govers 2000; Hassan 2000; Huybers and Bennett 2003; Jamal and Getz 1996; Mihalic 2000; Soteriou and Roberts 1998; Stevens 1992; Taylor 1995; Tourism Council Australia 1998).

Recalling, from above, Gray’s (1989) encouragement for the development of models tailored to particular service categories, four such studies have led to the development of general conceptual models of tourism destination competitiveness. Crouch and Ritchie (1994, 1995, 1999; Ritchie and Crouch 2000a, b) were the first to commence development of a general model of destination competitiveness. Their body of research and resulting model is comprehensively reported in Ritchie and Crouch (2003) and the most recent empirical evaluation of the competitiveness factors identified in their model is reported in Crouch (2011). Borrowing some of the ideas from Crouch and Ritchie, Dwyer et al. (Dwyer and Kim 2003; Dwyer et al. 2004) formulated a conceptual model arising from their research focused on Australia and South Korea. Similarly, Heath’s (2002) model, although developed “as a frame of reference to enhance South Africa’s tourism competitiveness” (p. 124) nevertheless identifies elements and a structure which may also be more generically useful. The fourth contribution has been produced by the World Economic Forum which has sought to measure national tourism competitiveness. Their Travel and Tourism Competitiveness Index (TTCI) (World Economic Forum 2007a, b) evaluates the competitive tourism performance of over 100 countries. The TTCI comprises 58 competitiveness variables categorized into 13 so-called “pillars” of competitiveness. As a conceptual model for understanding and managing destination competitiveness, Crouch (2007) has noted, however, several shortcomings and weaknesses of this index.

A Conceptual Model for Managing Destination Competitiveness

As we have seen, competitiveness theory is based on two main foundations – the theory of comparative advantage (derived from Smith (1776) and Ricardo (1817)) and competitive advantage theory (most notably represented by the research of Porter (1980, 1985, 1990) and Hunt (2000)). The theory of comparative advantage focuses primarily on differences in factor conditions between places. Porter contends that this theory alone is too limited.

A new theory must move beyond the comparative advantage to the competitive advantage of a nation. It must explain why a nation’s firms gain competitive advantages in all its forms, not only the limited types of factor-based advantage contemplated in the theory of comparative advantage. Most theories of trade look solely at cost, treating quality and differentiated products in a footnote. A new theory must reflect a rich conception of competition that includes segmented markets, differentiated products, technology differences, and economies of scale. Quality, features, and new product innovation are central in advanced industries and segments. (Porter 1990, p. 20)

The literature on these two theoretical foundations does not draw a clear distinction, but it does note a difference in emphasis. The theory of comparative advantage primarily recognizes differences in the factors of production – both naturally occurring and created factors. Some

places or communities are endowed with more or less of these factors of production than are others, leading to comparative advantages or disadvantages. By comparison, competitive advantage theory recognizes that having such a comparative advantage alone only partly accounts for differences in competitiveness. To explain the rest, it is also necessary to consider how well the community deploys the endowed comparative resources with which it has been blessed.

Based on these theories, Crouch and Ritchie (1999) developed a detailed conceptual model of destination competitiveness (see Ritchie and Crouch 2003, for a full explanation of this model). Figure 29.2, introduced earlier above, summarizes the key elements of this model. Subsequent empirical applications of the model have confirmed its usefulness. Enright and Newton (2004) noted that “the overall results provide strong support for the combined approach to tourism destination competitiveness suggested by Crouch and Ritchie” (pp. 786–787). “The results reinforce the value of the more comprehensive approach suggested by Crouch and Ritchie (1999)” (Enright and Newton 2005, p. 348).

As theoretical foundations, the conceptual model of destination competitiveness recognizes comparative advantages which arise from resource endowments, and competitive advantages which derive from the effective deployment of these endowed resources. These endowed resource advantages include human, physical, knowledge, capital, historical and cultural resources, as well as infrastructure, tourism superstructure, and the size of the local host economy. On the other hand, the capacity to effectively deploy these resources depends upon the host community’s awareness and knowledge of these resources (audit and inventory); their maintenance, growth and development of these resources; and their effective and efficient use.

The model proposes that there are five main groups of attributes which determine a destination’s competitiveness. These five pillars of destination competitiveness act within a competitive (micro) environment as well as a global (macro) environment. The global or macro-environment is shaped by numerous forces and trends which vary over time and across destinations. Changing demographic characteristics, technological changes and innovations, economic events and trends, ecological concerns, political and legal developments and crises, and sociocultural environments all serve to influence the competitive conditions facing a destination at any point in time. While these factors are very broad in their scope and produce implications which extend well beyond the tourism sector, by contrast, the competitive micro-environment is comprised of the influences and forces which lie within the destination’s immediate tourism marketplace. As such, the micro-environment tends to have a more apparent and direct impact on a destination’s competitiveness. This competitive micro-environment is largely comprised of the elements which make up what is referred to as the “travel trade.” It is therefore determined by the actions of suppliers, market intermediaries and facilitators, customers and consumers (as represented by market segments and particularly target markets), and other relevant competing destinations. Additionally, and very importantly, a destination’s micro-environment includes its own internal environment since a destination is actually a collection of many different private and public enterprises, organizations, and players. The state of this internal environment can significantly impact the health of a destination’s competitive capabilities. Finally, the micro-environment also includes public or additional stakeholders which may not be a part of the tourism mainstream but which nevertheless may be key constituents.

The five main groups of attributes that are depicted in the model therefore shape a destination’s competitiveness, given the destination’s current and anticipated, global and competitive environments. A detailed discussion and explanation of these competitiveness attributes can be found in Ritchie and Crouch (2003). Below we therefore provide a brief overview and explanation of these attributes.

Suggestive of their foundational nature, *supporting factors and resources* are depicted in the conceptual model at its base. This group of attributes, as their label implies, serves to aid or assist a destination’s competitive capacities. These attributes have little direct impact on a destination’s

attractiveness. But they can significantly influence a destination's ability to utilize its attractive qualities. Many tourism attractions and private enterprises depend on basic *infrastructure* to function effectively and to serve the needs of visitors. The *accessibility* of the destination itself and of the many tourism services and sites within, impacts the availability of tourism experiences. Various *facilitating resources*, such as the availability and quality of local human, knowledge, capital, and public sector resources also benefit the destination's tourism system. The level of *hospitality* presented to visitors by local residents can have an important bearing on the quality of the visitor's experience. A strong local spirit and sense of *enterprise* tends to improve the quality of service and fills gaps or opportunities available within the tourism market. The level of *political will* – that is, the degree to which, as a sector, tourism receives recognition and support through public policy – is the final attribute within this group which can support a competitive tourism sector.

Founded upon these supporting factors and resources are a destination's *core resources and attractors*. The distinguishing feature of this group of attributes is that they represent the critical characteristics of a destination which motivate tourists to want to visit. A destination's *physiography and climate* encompasses the natural aesthetic and scenic qualities which can be a major part of a destination's appeal. In addition to these natural endowments, a destination's *culture and history*, and the assets which record, preserve, and present this legacy, also contribute substantially to a destination's appeal. The richness and diversity of a destination's *mix of activities* can also add to a destination's competitiveness by ensuring that it is not overly dependent on one (or a few) major attractions. Some destinations have been able to generate significant touristic appeal by developing particular strengths in terms of their ability to host *special events* which continually draw tourists over time. Similarly, through the *entertainment* sector, other destinations have achieved their own significant standing in the tourism market. Specialist tourism *superstructure*, such as airports, conference centers, and iconic structures (e.g., the Gateway Arch in St. Louis, or the Sydney Opera House), can also add significantly to a destination's appeal. The last attribute in this group concerns various *market ties* which connect a destination to various origin markets in terms of cultural, ethnic, business, and religious links which can often significantly stimulate the need or desire for travel.

These first two groups of attributes discussed above are dominated mainly by those resource endowments that constitute a destination's *comparative* advantages. The next two groups of attributes principally address a destination's *competitive* advantages; that is, the capacity of the destination to *deploy* those resource endowments optimally. The conceptual model distinguishes between attributes which, on the one hand, relate more to planning and analysis, and those which are, on the other hand, more closely concerned with implementation and control. The former group of strategically oriented attributes is labeled *destination policy, planning, and development*, whereas the latter group is labeled *destination management*.

Several attributes form the *destination management* group. Effective destination management requires some notion of *organization* – some sort of implicit or explicit management structure that ensures a level of cooperation and teamwork among the key players involved in executing the day-to-day efforts which constitute the destination's strategy. *Destination marketing* is an example of a key element of this strategy that requires a coordinated approach. The *quality of service/experience* attribute pertains to the effectiveness of the destination in orchestrating a superior visitor experience through customer service involving all five human senses. Timely and quality *information/research* enables superior destination management decision making. Efforts to enhance the availability of a destination's qualified and knowledgeable labor resources through tourism-specific training and *human resource development* are also important to a destination's overall performance. Similarly, the availability of *finance and venture capital* to facilitate tourism investment and development is the lifeblood for tourism projects. The absence of adequate finance may block or constrain the implementation of otherwise good tourism plans.

In destinations with large visitor numbers or sensitive environments, some form of *visitor management* may be needed to mitigate negative impacts or to smoothly handle tourism congestion. Given the significant degree to which destinations are often dependent on vital natural and cultural resources, destinations which seek to enact a *resource stewardship* role are more likely to protect the sustainability of such resources and therefore long-term competitiveness. The last of the destination management attributes addresses the issue of *crisis management*. Tourism destinations have had to contend with threats ranging from terrorism, to crime, disease, natural disasters, etc. A proactive plan to respond to such crises is needed not just to deal with the immediate human consequences but also to the adverse aftermath affecting the tourism sector.

The attributes which comprise the destination policy, planning, and development group begin with *system/definition*. An effective destination strategy requires agreement on what constitutes the scope of the destination. Effective strategy requires consensus with regard both the *object* as well as the *subject* of the strategy. In a similar way, destinations need to find common ground with regard to a shared *philosophy/values* as well as a *vision* for the destination. Here, the values and goals that define quality-of-life for the host community can provide the guiding principles that should direct and govern tourism policy. Effective *positioning/branding* seeks to ensure that the destination is well placed in the minds and perceptions of the destination's core target markets. *Development* policies need to aim to stimulate and regulate the right sort of growth in terms of tourism supply, as well as the ideal form of tourism demand consistent with sustainability principals. As competitiveness is a relative concept, destinations require *competitive/collaborative analysis* to inform the strategic decision-making process. Strategies based only on introspection are likely to misdiagnose or ignore important competitive threats or opportunities. The final two attributes in this group include the need for suitable *monitoring and evaluation* as well as a periodical *audit* of the destination. Destination's which track performance and which undertake regular "health checks" are more likely to anticipate and identify, and therefore respond to problems early.

The last group of attributes which determine a destination's competitive circumstances concern a number of *qualifying and amplifying determinants*. The main feature of these attributes is that they either act to limit or constrain the destination's competitive position, or they serve to reinforce or leverage the same. For example, a destination's *location* may be an advantage or a disadvantage relative to significant origin markets as well as to other competitive and collaborative destinations. Tourism markets are becoming increasingly sensitive to *safety/security* concerns. In today's competitive global tourism marketplace, tourists have a wide variety of options available to them whereby it is easy to readily substitute one destination with another when security threats suddenly appear. Research has shown that tourism demand is often quite price sensitive. Although truly unique destinations are able to overlook the issue of price to some extent, the majority of destinations do not have the luxury of being able to rely on their uniqueness as protection against their declining price competitiveness. Thus, destinations need to be concerned about their relative *cost/value* position. The *awareness/image* of a destination is influenced by many different messages and sources of information which contribute to the formation of impressions of the destination held by different tourism markets. Awareness and image take time to form and change. Thus, tourism markets may hold impressions that are no longer accurate. In this way, bad images can suppress and favorable images can amplify a destination's competitiveness. The last attribute in this group relates to the destination's *carrying capacity*. There is some debate about the managerial usefulness of this concept, but it is no doubt clear that, for some destinations, such as Venice or Yosemite National Park, carrying capacity is a major challenge to the competitive position of certain destinations.

The conceptual model of destination competitiveness described briefly above can serve as a communication tool which can facilitate discussion and debate among all parties and stakeholders within the destination as they seek to collaborate on the task of deciding how best to achieve particular goals. In particular, the model provides a language and centralizing framework which

can enable a host community to actively contribute in such efforts and to ensure that quality-of-life philosophies, values and goals play a central role in determining how tourism development might help to contribute to these ideals. In the next section we consider how these theories and this model might be used in practice in promoting host-community QOL.

Destination Competitiveness and QOL Research Challenges

Earlier in this chapter, we saw that the most appropriate way to think about destination competitiveness is as a measure of a destination's capability of achieving a set of identified goals in a competitive global tourism environment where such goals are formulated by all stakeholders in a destination. Thus, the goals and aspirations of the host community must, in an open, transparent, and democratic context, govern how tourism development contributes to the realization of these goals. In developing these goals, host communities will inevitably identify various economic, social, cultural, environmental, and lifestyle values which represent their collective aspirations. In other words, we can most simply think about these goals as representing the ongoing quest by a host community to maximize the overall quality-of-life of its residents.

If tourism development is to contribute significantly to the improvement of host-community QOL through the process of managing destination competitiveness, research over the past 15 years has begun to formulate frameworks that can enable this process. One such framework, in the form of a conceptual model, has been described in this chapter. So we therefore have the beginnings of a body of knowledge which can help to guide this task. At this point, it is therefore useful to ask: what else do we need to know or better understand if the host community is going to manage the destination's competitiveness to improve its QOL fortunes?

The answer to this question seems particularly to depend on two main avenues of further research inquiry. The first avenue is to build on the body of research to date by examining in greater detail how the model's competitiveness attributes actually contribute to destination competitiveness. The second avenue is to explore practical and effective ways of identifying QOL goals to begin with, but most particularly, learning how such broad and general goals are best translated into tourism-specific objectives which are concrete, implementable, and measurable. A brief speculative research agenda for each avenue of inquiry is proposed.

With regard to the refinement and application of the conceptual model of destination competitiveness, several needs are evident. The model identifies numerous competitiveness attributes but does not provide any insight at this time into the relative significance of each attribute. A recent study, however, by Crouch (2010), which is the first empirical effort to begin to understand the degree of determinance of each attribute, found that ten of the 36 attributes in the model were judged by experts to be statistically more significant than the average in their determinant impact. These ten attributes in rank order were *physiography and climate*, *culture and history*, *tourism superstructure*, *mix of activities*, *awareness/image*, *special events*, *entertainment*, *infrastructure*, *accessibility*, and *positioning/branding*. As these findings concerned destination competitiveness in general, there is a need to understand how different attributes would impact competitiveness related to very different tourism market segments. For example, one would expect to find that a very different set of attributes are important in relation to the conventions and meetings market versus the ecotourism market.

Every destination is in a unique set of circumstances and faces unique challenges. It is therefore quite inappropriate to think that such a model can provide simple *recipes* for improving the competitive fortunes of a destination. There is therefore a need to understand better how differences in situational circumstances might impact the role that the various competitiveness attributes might exert. For example, destinations in undeveloped or developing nations must contend with quite

different problems and issues compared to destinations in developed nations. Research which sheds light on how the model might provide guidance under these quite different circumstances would be very useful.

Efforts, such as the work of the World Economic Forum to develop a Travel and Tourism Competitiveness Index discussed above, may provide some practical means of applying measurement to the task. While measurement indices such as this need to be parsimonious, it is critical that they do not trivialize the complexities involved to the point where they are of questionable value.

Turning now to the second avenue of research inquiry, that is, the need to learn how broad and general QOL goals are best translated into tourism-specific objectives.

Research for Relating Resident QOL Goals and Visitor Quality of Experience Objectives

As a major part of this larger focus on the integration of policies that seek to ensure the realization of QOL goals for destination residents and the delivery of quality experiences for destination visitors, we now turn our attention to future research challenges related to these efforts to achieve such policy integration.

First, since we have stressed the extent to which we believe QOL goals have as their foundation the values of destination residents, we feel there is a pressing need for research to more fully confirm the nature and strength of the extent from which resident value and QOL goals are indeed related. We remind readers that value refers to stable underlying concepts – while QOL goals are potentially more likely to be transient in nature. This uncertainty calls for research to explore and establish the reliability of the relationship.

Second, the integrative policy model in Fig. 29.1 implicitly assumes that destination residents are willing to trade-off improvements in QOL in return for delivering quality experiences to visitors from outside the destination. Research is needed to explore the kind of trade-offs that residents deem desirable and/or unacceptable.

Conclusion

If a tourism destination is to succeed in today's highly competitive marketplace, it must both accommodate and effectively deploy the range of resources described in our earlier works (Crouch and Ritchie 1999; Ritchie and Crouch 2003). Competitive success alone may not bring destination residents the full range of quality-of-life (QOL) benefits that they desire. In order to derive the maximum QOL benefits desired by residents, destination managers need to first identify which quality-of-life benefits are most consistent with the values of local stakeholders – and then set out to systematically integrate those desired QOL goals into a tourism policy that recognizes that resident QOL goals can only be achieved if the policy also ensures that visiting tourists are also provided with high-quality visitation experiences. To go one step further, if the destination wishes to cement its QOL ambitions, it should seek to ensure that visitor experiences are not only of a high quality but should also make a major effort to ensure they are truly memorable.

Very few destinations have recognized the challenges inherent in merging visitor quality of experience (QOE) realization with resident quality-of-life (QOL) goals. To assist forward-looking destinations with the tools to achieve the integration of these diverse objectives, this chapter sets out a framework for going beyond visitor experience demands to ensure successful

competitiveness and then moving toward also ensuring successful QOL for residents. We truly believe that the achievement of both goals is not only possible, it is essential for true success in tourism. As such, we hope that the guidance we have provided will be found helpful.

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Chapter 30

Destination Management, Competitiveness, and Quality-of-Life: A Review of Literature and Research Agenda

B. Bynum Boley and Richard R. Perdue

Introduction

This chapter is predicated on two assumptions and beliefs. First, we believe that destination development and management in the future will continue to focus more and more on sustainability and contributing to local resident quality-of-life; therefore, tourism planning will become more integrated with community planning. Second, destination management organizations (DMOs) will continue to be the leaders for destination tourism planning and strategy implementation. In recent years, DMO strategy and process has been focused within the rubric of “destination competitiveness.” Although the destination competitiveness literature discussed both sustainability and resident quality-of-life, little research has specifically examined the interrelationships between them. This is surprising given that the tourism planning literature has historically focused on three central goals: visitor satisfaction, economic development, and resident quality-of-life (Gunn and Var 2002).

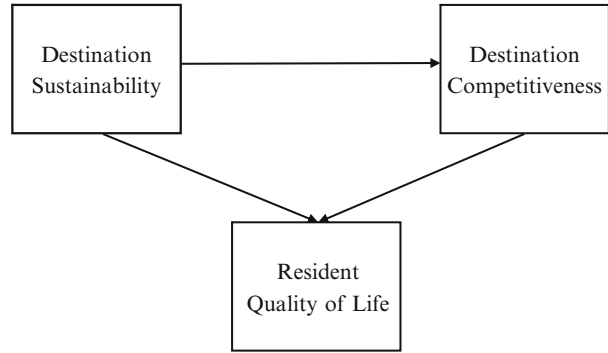
The destination competitiveness framework focuses on the processes of identifying and creating/maintaining a competitive advantage and using that advantage to outperform other destinations for a targeted tourist market. The seminal work in destination competitiveness is of Ritchie and Crouch (2003), who define destination competitiveness as a destination’s ability to “to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, *while enhancing the well-being of destination residents* and preserving the natural capital of the destination for future generations” (emphasis added).

Sustainable development has also become a core tourism planning construct (Hunter 1997; Smith 2001) with substantial research focusing on the definition of sustainability (Garrod and Fyall 1998), determining dimensions of sustainable tourism (Hunter 1997), examining alternative planning processes (Berry and Ladkin 1997; Ahn et al. 2002), and determining performance

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Fig. 30.1 Destination sustainability, competitiveness, and resident quality-of-life



metrics (Shane and Graedel 2000; Miller 2001; McCool et al. 2001). The core performance metric of sustainability is the “triple bottom line” of economic, natural, and social benefits. Particularly for community development authorities, resident quality-of-life has emerged, over the past two decades, as the primary/most important measure of the value added to a community through tourism development (Perdue et al. 2010).

Thus, as reflected by Fig. 30.1, both key frameworks for destination planning and management have resident quality-of-life as a critical outcome/measure of success. However, the research on tourism destination resident quality-of-life is based almost exclusively on the sustainability framework. As evidence, virtually all of the destination planning and management chapters in this book are based on sustainability. As a compliment to the sustainability framework, the purpose of this chapter is to provide a review of the destination competitiveness literature and to articulate an agenda for future research on the interface between these two constructs. The premise of this chapter is that destination competitiveness and quality-of-life are not contradictory constructs, but rather that the pursuit of a competitive destination and/or sustainability should increase resident quality-of-life.

With Ritchie and Crouch’s (2003) definition of “destination competitiveness” in mind, this literature review is organized in three sections: (1) the factors affecting competitiveness, (2) definition and measurement of competitiveness, and (3) strategic destination management with the ultimate goal of improving the destination’s triple bottom line, specifically resident quality-of-life. We conclude with our suggestions for future research.

Factors Affecting Destination Competitiveness

The destination competitiveness literature varies widely from conceptual models that postulate that competitive advantage is based on abstract concepts such as natural resource endowments and the clustering of businesses (Miller et al. 2008; Barney 1991; Michael 2003; Porter 1998; Melián-Gonzalez and García-Falcón 2003; Gilbert 1984, 1990) to models that advocate destination competitiveness is a function of specific sets of destination attributes (Ritchie and Crouch 2003; Dwyer et al. 2004; Enright and Newton 2004; Mazanec et al. 2007; Hassan 2000). Hence, this literature review will begin by examining the conceptual models of destination competitiveness with the purpose of showing how the factors that affect destination competitiveness also inadvertently lead to residents’ quality-of-life and a higher quality tourism experience. That will be followed by a review of the studies that have advocated specific models of destination competitiveness, identifying specific attributes or determinants of success.

Conceptual Models of Destination Competitiveness

Porter's Three Generic Competition Strategies

Most conceptual models of destination competitiveness are based on Porter's (1980) three generic strategies of firm competition: (1) overall cost leadership, (2) differentiation, and (3) market focus. In tourism, overall cost leadership consists of providing the cheapest destination within a set of destinations. Cost leadership may be a beneficial strategy for attracting tourists from nearby surrounding areas since the proximity of the destination provides a price advantage through the ease of transportation, but the literature also indicates that overall cost leadership at the destination level is not a sustainable strategy due to its focus on lowering prices and providing cheaper services through mass production of the tourism product. Buhalis (2000) acknowledges that tourism destinations have finite resources, and a cost leadership strategy will likely cause unsustainable development. The sole focus on price causes lower wages for tourism industry employees, a commodification of the region's culture, and potential harm to the area's environment due to development exceeding the region's carrying capacity. If the overall goal is to increase resident quality-of-life and to provide tourists with a quality experience, it would appear from Buhalis' (2000) and Porter's (1980) point of view that a cost leadership strategy would actually diminish quality-of-life due to the sole focus on price rather than quality and protection of key resources.

A differentiation strategy focuses on emphasizing unique attributes that provide attractive reasons for selected target markets to visit one destination over another. At the heart of this strategy is the process of identifying and matching destination attributes with target markets which value those attributes. A corresponding element is building, enhancing, and sustaining those destination attributes which both serve to create competitive advantage and enhance resident quality-of-life through incremental recreation, entertainment, and hospitality experiences. A differentiation strategy highlights resources that are unique to tourism destinations and protects them because a destination realizes that these resources are fundamental to achieving a sustained competitive advantage. At the same time, this strategy will naturally preserve the character of place by funneling money and attention toward the resources which are valued by the local residents. In this manner the residents' QOL, which is predicated upon natural and cultural resources, will be maintained/increased through a tourism strategy that emphasizes the uniqueness of the destination.

The last of Porter's generic strategies, niche strategies, focus on targeting a limited number of specific market segments and attracting that/those segment(s) through cost leadership and/or differentiation (Buhalis 2000). This approach works best when a destination can identify niche market segments that match with the destination's capabilities and resident personalities. Typically, this strategy is pursued by destinations with limited physical and/or financial resources. While this strategy is considered risky as its focus on specific target markets de facto increases vulnerability to changes in those selected markets, this strategy can contribute positively to the interaction between tourists and residents. Segmentation of the tourism market allows the type of tourists to be correctly matched to a destination's resource capabilities (Dolnicar 2004; Hvenegaard 2002). In theory, correctly matching the right market segments with the destination can create a higher level of satisfaction for both the traveler and the local residents. Sustainable tourism niche markets such as ecotourists and geotourists have been found to be an attractive market segment based upon their higher incomes and high levels of education (Dolnicar et al. 2008), but they are also supposed to be more thoughtful travelers who minimize their negative impacts while maximizing their positive ones. This makes them an especially attractive market to those destinations who want to maximize the positive impacts of tourism while minimizing its potential negative impacts. Much of the resident quality-of-life research has identified those interactions as a central element in resident response to tourism development (Uriely et al. 2009).

The vast majority of the destination competitiveness literature embraces either a differentiation or a niche strategy focusing on identifying a destination's unique attributes and matching those with appropriate target market(s). Resident quality-of-life is enhanced by sustaining the character of place that makes a destination special both to tourists and residents. The next few strategies presented continue to build upon this perspective. These strategies consist of the resource-based view of competitive advantage (RBV) (Barney 1991), Gilbert's strategic framework (Gilbert 1984, 1990), and cluster theory (Michael 2003; Porter 1998).

The Resource-Based View of Sustainable Competitive Advantage

A dominant theory of competitive advantage within the strategic management literature is the resource-based view (RBV) (Barney 1991). The RBV posits that firms are able to garner a sustained competitive advantage over competitors through control of resources that are valuable, rare, imperfectly imitable, and cannot be substituted with different resources. The RBV is based upon two important assumptions: (1) that there is resource heterogeneity among firms (firms do not have equal access to resources) and (2) that these resources are not perfectly mobile across firms, which allows firms to achieve a sustained competitive advantage that other firms cannot copy or mimic (Barney 1991). According to Barney (1991), resources that are valuable and rare can give firms a competitive advantage but a sustained competitive advantage can only be achieved if these resources cannot be imitated or substituted with another product.

Even though this theory was developed to explain competition among firms, Miller et al. (2008) and Melián-González and García-Falcón (2003) have applied it to the explanation of why certain tourism destinations consistently outperform others. Tourism destinations have a fixed set of natural and cultural resources that are subject to shortages and are imperfectly mobile. Embracing the RBV in the context of destination competitiveness could potentially add to residents' QOL through its recognition of local resources such as natural features and cultural heritages sites as strategic resources, thereby promoting their conservation as keys in the destination's long-term success over the long term.

Gilbert's Strategic Framework

Another model of destination competitiveness that builds upon the idea of differentiating a destination based on unique attributes is Gilbert's strategic framework (Gilbert 1984, 1990 cited in Buhalis 2000). In Gilbert's framework, tourism destinations are separated into status areas and commodity areas based upon the destination's attributes and price sensitivity. Buhalis (2000) describes status areas as succeeding from a combination of unique product attributes that cause travelers to perceive the destination as "irreplaceable." This irreplaceableness gives the destination the ability to compete because tourists are more likely to pay more since they view the destination as "one of a kind." On the other hand, commodity areas are those that compete solely on price, due to the ease of substituting a similar destination in their place (Buhalis 2000). Gilbert (1990), cited in Buhalis (2000), recommends that destinations should strive to become status areas because they have greater profit margins and more loyal visitors. According to Gilbert (1990), when a destination is downgraded to a commodity area, its only hope for competing is based upon price, which could potentially lead to mass tourism (i.e., high volume, low profit margins), with its corresponding negative effects on the environment and local residents. Gilbert's strategic framework suggests that resident QOL would increase when classified as a status area rather than a commodity area because status areas compete based upon the unique assembly of resources which highly correlates with the resources that make areas quality places to live for residents.

Cluster Theory

The previously mentioned competitive strategies focused on how resources or destination attributes provide competitive advantages. Cluster theory provides a different theory of destination competitiveness. Cluster theory is based upon the geographic concentrations of similar firms that create competitive advantages through their coexistence (Porter 1998). According to Porter (1998), clusters affect competition by increasing productivity, driving the direction and pace of innovation, and stimulating the formation of new businesses. Porter (1998) relates the cluster theory of competition to tourism in the following quote:

The quality of a visitors' experience depends not only on the appeal of the primary attraction, but also on the quality and efficiency of complementary business such as hotels, restaurants, shopping outlets, and transportation facilities (Porter 1998; pg. 81).

Michael (2003) further elaborates on cluster theory's application to destination competitiveness by explaining how a group of destinations can bundle their individual unique attributes to create a "specialized regional product." Michael (2003) breaks clustering down into three dimensions: horizontal clustering, vertical clustering, and diagonal clustering. Horizontal clustering refers to firms that are competitors due to similar locations. Vertical clustering refers to when industry supply chains are centrally located to lower costs and minimize logistics. Diagonal clustering is probably the most applicable to tourism destination competitiveness since it refers to how the addition of each firm adds value to the existing firms. Michael (2003, p. 138) describes diagonal clustering as bringing "together firms that supply separate products and services, effectively creating a bundle that will be consumed as though it was one item." Clustering adds depth to a tourism destination because the destination's attractiveness is based on multiple attractions and services. For example, a destination may have a unique feature, but without ease of transportation or quality places to stay and eat, it may be less competitive than destinations which have created a specialized regional product based upon a combination of unique resources and supporting products. An example of DMOs using this "bundle" strategy to increase the competitiveness of their destination and create a "specialized regional product" is National Geographic's geotourism mapguide of the Crown of the Continent where various DMOs within Montana, Alberta, and British Columbia came together to promote the uniqueness of the entire region regardless of state, provincial, and national boundaries (Bosak et al. 2010).

When examining Cuba's competitiveness, Miller et al. (2008) acknowledge that both the resource-based view and cluster theory may be helpful in understanding destination competitiveness. Even though the strategies are examined separately throughout the article, Miller et al. (2008), citing Guillen (2000), suggests that the resource-based view may be useful in explaining the formation of tourism clusters. Destination competitiveness most likely depends upon a combination of the two because a truly unique resource will not attract visitors unless there are complementary features and services. Those same features and services such as restaurants, boutiques, art galleries, and public parks can also be purchased and used by local residents. Further, several of the resident attitudes toward tourism studies have identified "distance from the tourism center of town" as an important predictor of resident attitude (Belisle and Hoy 1980; Allen et al. 1993).

Specific Attribute Models of Destination Competitiveness

Dwyer et al. (2004), Enright and Newton (2004), Hassan (2000), Mazanec et al. (2007), and Ritchie and Crouch (2003) elaborate upon these conceptual models of competitiveness by identifying specific attributes that contribute to a destination competitiveness. The key attributes used by these studies to measure destination competitiveness are provided in Table 30.1.

Table 30.1 An abbreviated list of factors affecting destination competitiveness by model

	Culture/heritage	Openness to tourism/ visas/political will	Communication/ technology	Social competitiveness	Community support/ residents' attitudes	Destination policy	Location and access	Safety	Natural resources/ climate
Competitiveness Monitor (WTCTC) Mazanec et al. (2007)	X	X	X	X		X			
Enright and Newton (2004)	X	X	X					X	X
Hassan (2000)	X	X	X					X	X
Ritchie and Crouch (2003)	X	X	X						
Dwyer et al. (2004)	X	X	X		X			X	
Environmental preservation/ commitment/carrying capacity			Bundle of tourism attractions	Business-related factors/industry structure	Tourist demand orientation	General infrastructure			
Competitiveness Monitor (WTCTC) Mazanec et al. (2007)	X	X				X			
Enright and Newton (2004)		X	X	X		X	X	X	X
Hassan (2000)	X		X		X	X			X
Ritchie and Crouch (2003)	X						X	X	X

Additionally, we review the work by Mazanec et al. (2007), Ritchie and Crouch (2003), and Hasan (2000).

Mazanec et al. (2007) used an adapted version of the World Travel and Tourism Council's (WTTC) model of destination competitiveness (the Competitiveness Monitor (CM)) to test its ability to explain outcomes such as market share and tourism growth. The CM attempts to encapsulate the concept of tourism competitiveness using eight social and economic indicators of competitiveness that are believed to be comparable across countries (Gooroochurn and Sugiyarto 2005). The original eight indicators of competitiveness are price, openness, technology, infrastructure, human tourism, social development, environment, and human resources (Gooroochurn and Sugiyarto 2005). These indicators are measured using indices such as the "education index" for the "human resource indicator," and "hotel price" for the price indicator. The results from Mazanec et al. (2007) analysis of the CM's ability to explain tourism market share found that only the dimensions of heritage and culture, education, and social competitiveness were significant indicators of market share with heritage and culture being the best predictors. This is significant because the attributes of heritage and culture and education are directly associated with resident quality-of-life.

Probably the most comprehensive and popular model of destination competitiveness comes from Ritchie and Crouch's (2003) book titled *The Competitive Destination: A Sustainable Tourism Perspective*. The book presents a complex model of destination competitiveness consisting of five vertically linked determinants of competitiveness, as well as a few factors that moderate the ability of destinations to be competitive such as the competitive micro climate and the global macro environment. The five categories are (1) core resources and attractors, (2) supporting factors and resources, (3) destination management, (4) destination policy, planning, and development, and (5) qualifying and amplifying determinants. Each of these five categories is further broken down into sets of indicators.

Ritchie and Crouch's (2003) model also includes factors that moderate the competitiveness of tourism destinations. The first set of factors that moderate destination competitiveness are the competitive (micro) environment of the destination and the global (macro) environment which both guide the destination's competitiveness. Other moderating factors within the model are the differences between comparative advantage and competitive advantage and how they each influence destination competitiveness. Comparative advantage is similar to the RBV, and is based upon the natural endowed resources that a destination has, such as natural and cultural resources (Ritchie and Crouch 2003). A comparative advantage can be based upon spatial variations of resource endowments, such as the destination's natural and historical attractions or even its climate. Comparative advantages are ultimately out of a destination's control. While a destination may be blessed with the natural endowment of strategic resources, it does not necessarily translate into competitiveness. Competitive advantage refers to the destination's "ability to use these resources effectively over the long term" to attract visitors (Ritchie and Crouch 2003, p. 23).

While the model provided by Ritchie and Crouch (2003) suggests more specific attributes that foster destination competitiveness, aspects of some of the previously mentioned theories of competition are present. For example, Ritchie and Crouch (2003) describe "core resources and attractors" as the "fundamental reasons why prospective visitors chose one destination over another." They also call "core resources and attractors" the "foundation of destination appeal." This focus on destination resources is very similar to the resource-based view of strategy which emphasizes that competition is based upon firms having access to valuable, rare, imperfectly imitable, and non-substitutable resources (Barney 1991). Ritchie and Crouch's (2003) model also includes the dimension of "Supporting Factors and Resources," which can be compared to Porter's cluster theory of competition where the competitiveness of the destination can be enhanced from the co-location of other business and destination attributes. Destination competitiveness is not solely based upon one key attractor, but the manner in which the destination's

attributes work together to form a “specialized regional product.” Ritchie and Crouch (2003) and Michael (2003) would suggest that destinations with a “specialized regional product” outperform destinations without the synergy of complementary resources. Therefore, it is important for the destination to look holistically at what it has to offer and market itself in a way that promotes a regional identity that consists of multiple attractive attributes. Ritchie and Crouch’s (2003) model provides a parsimonious examination of destination competitiveness. It is complex enough to include the various forces that affect the competitive environment, but also clearly demonstrates the important attributes that lead to destination competitiveness.

While Ritchie and Crouch’s (2003) model provides many different factors that affect the competitiveness of a destination, they label a destination’s culture and history and physiography and climate as core resources and attractors to the destination. The identification of these resources as being strategic links quality-of-life research, competitiveness, and sustainability together in common agreement that these resources are important to overall success of the region.

Hassan (2000) also provides indicators of destination competitiveness, but does so with a focus on environmental sustainability. Hassan (2000) argues that tourism destinations are dependent upon natural and cultural heritage resources, and that sustainable tourism should provide economic incentives to sustain those resources when properly managed. The determinants of destination competitiveness according to Hassan (2000) are based upon demand orientation, comparative advantage, industry structure, and environmental conditions. Hassan (2000, p. 242) also suggests that destination development should consist of “(a) basing destination plans and development strategies on unique natural and cultural attractions for the destination and its region; (b) reducing problems of seasonality; (c) developing a sense of place that reflects the attributes and differentiating aspects of the destination environment; (d) providing a sensitivity to the local environment including the use of traditional architectural styles, building materials, and energy-efficient building systems; and (e) using a systematic approach to destination planning.” While Hassan’s (2000) suggestions were meant to apply to destination competitiveness, they also directly relate to resident quality-of-life. Sustaining natural and cultural resources, decreasing seasonality, and protecting a region’s sense of place are all quality-of-life issues.

Destination Competitiveness Conclusions

The primary focus of the destination competitiveness literature has been on the organizational strategy and practices of destination management organizations (DMOs). As an acronym, DMO has historically represented destination marketing organizations. These organizations, at the local, regional, state, and national levels, are generally governmental agencies or nonprofit businesses created to represent tourism destinations with the focus on generating tourist visitation to the area (Gretzel et al. 2006). Historically this has been accomplished almost exclusively through promotional strategies and campaigns. Success was defined as “putting heads in beds” with either tourist visitation or tourist expenditures as the primary measures of success. Beginning in the early 2000s, the term “Destination Marketing Organization” has been largely replaced with “Destination Management Organization,” implying a shift both in responsibilities and, to a much lesser extent, in the appropriate measures of success. Most importantly, DMOs have become far more active in strategic destination planning which is the foundation of the destination competitiveness literature. In part this reflects the general evolution of marketing theory and practice from focusing on transactions to relationships.

More importantly, it also implies substantially greater emphasis on managing the destination product or experience. Historically, DMOs largely relegated product or experience management to private tourism enterprises and, to a lesser extent, government land management organizations

such as state and national parks. While few DMOs are actively engaged in tourism product or experience management, there is far greater focus on coordinating destination businesses and agencies; on identifying, supporting, and, in many cases, financially subsidizing strategic product development; and on developing and implementing measures of destination quality (Perdue et al. 2010).

Incorporated in the more active leadership role of the destination *management* organization, there is ever-increasing emphasis on the political dimensions of tourism development and expansion. DMOs need to effectively demonstrate their value and contribution to their constituents, which includes local residents. Whereas historically, economic measures such as tourist visitation and expenditures were sufficient, social and environmental measures of contribution to the local community are increasingly important. Included in these measures are contributions to local resident quality-of-life. Beyond its economic contribution, how tourism contributes to the destination's social and environmental capital is increasingly important. As articulated in the following sections, efforts to improve destination competitiveness, thus, must demonstrate more than economic success; they must also demonstrate long-term contribution to destination quality-of-life.

Destination Competitiveness and Sustainability

In recent years, the concept of “sustainable tourism development” has become an increasingly important component of destination management (Perdue 2004). While there are many important elements of the construct of sustainability, two will be explored in this chapter. First, the construct of sustainability focuses heavily on inter- and intra-generational equity. Intergenerational equity focuses on resource conservation for future generations. Intra-generational equity emphasizes fairness to various destination population sectors both in access to the natural and cultural resources that support tourism development and in political voice concerning resource allocation decisions. Stakeholder theory has evolved to focus on the issues of intra-generational equity (Sautter and Leisen 1999) with three core components as related to DMO destination management: (1) the DMO builds relationships with different local resident constituent (stakeholder) groups that affect and are affected by tourism development; (2) each stakeholder group has interests that are important to the DMO, and no one set of interests is assumed to dominate the others, particularly over time; and (3) DMO effectiveness is enhanced by recognizing and, to the extent possible, being sensitive to the various groups (Freeman 1984; Friedman and Miles 2002). By extending its focus beyond those stakeholder groups directly and economically involved in the tourism industry, the DMO enhances its effectiveness, but also greatly complicates its mission and its measures of success.

Second, sustainability success is measured through a combination of economic, social, and environmental costs and benefits, commonly referred to as the Triple Bottom Line. Three forms of “community capital” are managed: (a) financial capital, (b) natural capital, and (c) social capital. As articulated by Dwyer (2005), strategic tourism destination management has the responsibility to protect and maintain the natural and cultural resources as well the economy for future generations. Incorporating the concept of a triple bottom line into DMO performance evaluation, thus, necessitates emphasis, not only on economic performance, but also on the creation, management, and preservation of environmental and social resources. Sustaining the natural and cultural resource endowments of a destination is important for three reasons. First, if a destination's natural and cultural resources are not sustained, it is the residents who suffer from a loss of an intact environment and degraded cultural heritage sites. The tourists do not directly suffer; they will just decide to visit a different destination where these resources have been preserved, which leads

to the second reason. Second, including the quality of the natural and cultural resources as a measure of success is critical as these resources are the “foundation of destination appeal” (Ritchie and Crouch 2003). To the extent that natural and cultural resources drive a destination’s financial success, investments which enhance these resource endowments will ultimately prove financially critical. According to the resource-based view of competitiveness, which is the foundation of most destination competitiveness literature, unique natural and cultural resources are what make a destination attractive to potential tourists. Destinations which do not sustain these resources will find themselves losing visitors or evolving to a less valuable/less attractive visitor population. Third, the residents, through political processes such as development laws and permits and DMO funding allocations, have the ability to either support or dramatically restrict tourism development and DMO activities. Failure to enhance resident quality-of-life and/or protect the destination’s natural and cultural resources will ultimately result in restrictions and limitations on tourism development. As noted below, there is a large body of research focusing on resident attitudes toward tourism development.

Interfacing destination competitiveness with sustainability, thus, requires a much broader and more complex “scorecard” for measuring destination management success. Examined historically, three clear phases of DMO performance measurement exist (Perdue et al. 2010). Initially, the emphasis was almost exclusively on financial performance, most importantly tourist visitation levels, spending, jobs, and tax revenues. Next, many destinations incorporated destination image and visitor satisfaction measures into their performance models. More recently, this research has been extended to monitor internal quality indicators and resident satisfaction (Kozak 2002; Wöber 2002). This is reflected in the results of the literature review by Mazanec et al. (2007) which identifies seven common measures of DMO success in tourism: (1) the number of visitors and expenditures generated, (2) the degree to which the negative effects of seasonality are successfully mitigated, (3) efficient use of existing capacities, (4) the extent to which natural and cultural resources are preserved, (5) visitor satisfaction with tourism products, (6) efficient use of market communication and advertising, and (7) the degree to which local residents accept existing tourism policy.

Resident Attitudes Toward Tourism

Long before the evolution of sustainability as a destination planning and management construct, resident attitudes toward tourism have been a major topic of tourism research. The foundation for this research has been the sustainability premise that, via the political process and the associated development laws and regulations, local residents have the ability to either support or greatly restrict tourism development (Andereck and Vogt 2000). The most widely cited model of resident attitudes is that developed by Perdue et al. (1990); subsequent research by Madrigal (1993), Snaith and Haley (1999), Jurovski et al. (1997), Gursoy et al. (2002), Ko and Stewart (2002), McGehee and Andereck (2004), and Andereck et al. (2005) have extended this model to a variety of research settings and populations and have largely supported the model’s central propositions. Based in social exchange theory, the model proposes that (1) to the extent that local residents perceive that they benefit from tourism development, they will support it, and (2) once those personal benefits are controlled for, resident support for tourism development is negatively related to the perceived levels of negative impacts (e.g., crowding and crime) and positively related to the perceived levels of positive impacts (e.g., economic opportunities and enhanced recreation/entertainment opportunities). Further research has also supported strong correlations between the personal benefits and tourism impact measures with various measures of resident quality-of-life (Perdue et al. 1999; Moscardo 2009).

An example of a form of tourism which tries to incorporate residents' attitudes in all aspects of the tourism process is geotourism (Boley et al. 2011; Bosak et al. 2010; Stokes et al. 2003). National Geographic defines geotourism as "tourism that sustains or enhancing the geographical character of a place- its environment, culture, aesthetics, heritage, and the wellbeing of its residents" (Stokes et al. 2003). Geotourism has the potential to increase competitiveness and add to the residents' quality-of-life due to focus on the unique qualities of a region. In its ideal state, geotourism turns to the local residents to provide suggestions of what tourism should look like in their region. This includes residents nominating local businesses and sites of natural or cultural significance to be included on mapguide and distributed to tourists. Some of the sites nominated by residents could be considered ecotourism sites such as hiking trails within national parks, but a majority of the sites are located in the "working landscape" where the natural environment and the built environment meet. These sites include local businesses such as restaurants and accommodations and areas of significant cultural heritage such as battlefields, museums, or even coal mines in the Crown of the Continent example (Boley et al. 2011). The hope is that these geotourism mapguides will encourage tourists to patronize businesses and sites that embody the destination's "sense of place" while keep tourism dollars within the local community. While geotourism may not be a strategy to attract conventional tourists, it could actually be a better strategy for increasing residents' quality-of-life through its focus on matching the residents' desire for increased tourism revenue without sacrificing the local way of life (supply) and niche markets of tourists who desire local experiences (demand). It could be a strategy that bridges the gap between resident quality-of-life and competitiveness with its dual focus on sustaining the character of place and attracting a market that wants to consume the same character of place that locals want to sustain.

Conclusion and Future Research Directions

This chapter is predicated on two assumptions and beliefs. First, we believe that destination development and management in the future will continue to focus more and more on sustainability and contributing to local resident quality-of-life; tourism planning will become more integrated with community planning. Second, we believe that the competition between destinations to attract tourists will continue to grow as a function both of the growing number of alternative destinations and continuing transportation and communication technology advances; successful DMOs will be those which are able to increase their competitiveness. Thus, a body of research is needed examining the social and environmental effects of DMO actions. Ultimately, the interface of DMO competitiveness strategies and resident quality-of-life will be determined by the ways and means by which DMO performance is evaluated.

Historically, DMOs have been evaluated almost exclusively on the basis of tourism's economic contributions to the destination community. Over time, this has evolved from number of tourists, to number of tourist nights of visitation, to total tourist expenditures, and more recently to a growing focus on the number of jobs created. The premise has been that growing the economy also grows jobs and economic opportunities for local residents. While this clearly has been and will continue to be an essential issue, it raises a number of important research questions. Most importantly, the number and quality of jobs created by different destination competitiveness strategies is not well understood. It is important to determine the proportion and quality of jobs available to local residents as opposed to nonresidents. Further, the emphasis on creating quality tourism jobs dramatically increases the importance of effectively countering the seasonality cycles characteristic of most tourism destinations. In many ways, competitiveness strategies that create shoulder and off-season jobs are far more valuable than those which create additional jobs during the peak season, particularly when the correlated issues of employee housing are

considered. An essential issue for future research is the effects of tourism destination development on the availability and costs of housing for local residents (Long et al. 2005).

Additionally, the interface of sustainability and competitiveness requires that DMO performance also be measured on social and environmental dimensions. Beyond the jobs issues raised above, this requires focusing on several of the quality-of-life measures consistently identified by the resident attitudes toward tourism, including congestion, crime, sense of place, cultural/heritage/environmental resource protection, and resident recreation and entertainment opportunities. Virtually all of the tourism destination competitiveness literature is framed within the resource-based view of sustainable competitive advantage, yet little research has actually focused on the issues of defining and protecting the unique, valuable, rare, imperfectly imitable, and non-substitutable resources. Defining and protecting these strategic resources is essential to future competitiveness as well as the residents' current and future quality-of-life.

Importantly, this research must examine the effects of different tourist market segments on these issues. As noted earlier, a critical component of the resource-based view of competitive advantage is matching valuable resources with appropriate target markets. As evidenced by much of the tourism stakeholder research (Perdue 2004), frequently the social and environmental impact concerns are as much or more a concern with certain types of tourists as opposed to the total numbers. Beyond some of the relatively crude research examining mass tourism destinations, relatively little research has focused on this dimension of market segmentation and target market selection. More research about responsible tourist market segments such as ecotourism and geotourism will help destinations attract these potentially higher-quality visitors that have been acknowledged to have less negative environmental and cultural impacts while still spending money within the local economy. The potential to have a smaller number of tourists traveling within the destination with an equal or higher economic impact than a larger number of mass tourists has significant implication for resident quality-of-life. Marketing toward these niche market segments could alleviate the many problems associated with mass tourism while still keeping the positive economic, cultural, and natural benefits that tourism can ideally add to resident quality-of-life.

Finally, the destination competitiveness literature has largely not addressed the inter- and intra-generational equity that constitute a core construct of sustainable development. DMO performance has historically been measured both in an overall sense and specific to a relatively short period of time. Addressing the concerns of intra-generational equity will require DMOs to address such questions as how their actions contribute to the economic, social, and environmental well-being of different segments of the local resident population. Further, intergenerational equity requires that DMO strategies be evaluated not only for their short-term benefits, but also for their long-term implications for local residents. As with the questions identified above, very little research has addressed these issues, but such research is a necessary component of being a sustainable, competitive destination.

This chapter has attempted to show the connection between the constructs of destination competitiveness, destination sustainability, and resident quality-of-life (Fig. 30.1). A DMO's decision to focus on competitiveness or sustainability, or both, will result in an increase in the resident's quality-of-life because the elements of competitiveness, sustainability, and resident quality-of-life are intertwined. The common link between these three constructs is the importance of natural and cultural resources to the future of the region as a quality place to live as well as attractive destination to visit. The identification of these natural and cultural resources as being strategic and worth preserving creates a strong link to resident quality-of-life research and to the overall success of the region. Neglecting to sustain the resources that are the foundation of a destination's competitive advantage will not only cause the destination to regress as in Butler's (1980) tourism area life cycle, but will disproportionately affect the local residents because the tourists will always find another destination to visit while residents are left to clean up the mess of unwise tourism development.

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Chapter 31

Destination Management and Quality-of-Life

Ige Pınar and Ebru Günlü

Introduction

Tourism occurs as a result of the movement of tourists from their homes to the destinations they are visiting. Thus, destinations in this regard may be briefly described as places or regions with some form of apparent or professed boundary (Kotler et al. 2006:726) having some specific resource, attractiveness, or characteristic valuable for the visitor where this value varies according to the aim of the travel. The tourism destinations' boundaries may be geographically obvious, but more commonly they are set by the visitors' perceptions and the image they possess (Usta 2008:225).

Carter and Fabricious defined tourism destination "as the basic unit of analysis in tourism which is a distinctly recognizable area with geographic or administrative boundaries that tourists visit and stay in during their trip where tourism revenue is significant, or potentially significant, to the economy and is serviced by both private and public sector" (Carter and Fabricious 2007). The boundaries and the compositions of the destinations may change over time according to the changes in the market trends resulting in the obligated application of flexible destination management plans with some alternative strategies. For Çetinkaya, "destinations are competitive units defined spatially, considered as products or bundles of products or services, which tourists regard as determinant of their journeys" (Çetinkaya 2009) which is obvious since the destination lies at the very heart of the travel and tourism system, representing as it does an amalgam of products that collectively provide a tourism experience to consumers (Gruescu et al. 2009:198).

Thus "a local tourism destination is a physical space in which a tourist spends at least one overnight. It includes tourism products such as support services and attractions and tourist resources within one day's return travel time" (WTO 2007:1) where it may be a country like Turkey, a region like Aegean, a city like Izmir, or a town like Çeşme (Öter and Özdoğan 2005:129). In addition to natural geographical boundary ones and perceptual boundary ones, there also exists superficial man-made destinations like theme parks as Disneyland.

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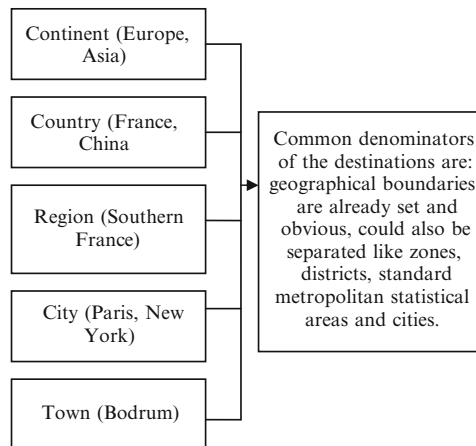
As a conclusion, it appears that a common tourism destination definition includes all of the following (Moreton Bay Destination Management Plan 2009:7; Bilima and Yüksel 2008:273; WTO 2007:1; Atay 2003:145):

- A destination is a cluster or mixture of tangible and intangible products, services, images, and experiences and all the pull factors like attractions that the area visited offers.
- A destination is a set of core and supplemental benefits like infrastructure, destination management and marketing applications, and superstructure that the area provides to the visitors.
- A destination consists of the image it creates, and has its own identity and character.
- A destination provides some level of satisfaction for the tourists with its push factors, appealing distinguishing characteristics, and the perceived value it offers.
- A destination is a fundamental unit including many complex dimensions of the tourism industry offering a wide spectrum of tourism products, offers, and services under the destination brand.

The Basic Elements of the Tourism Destination

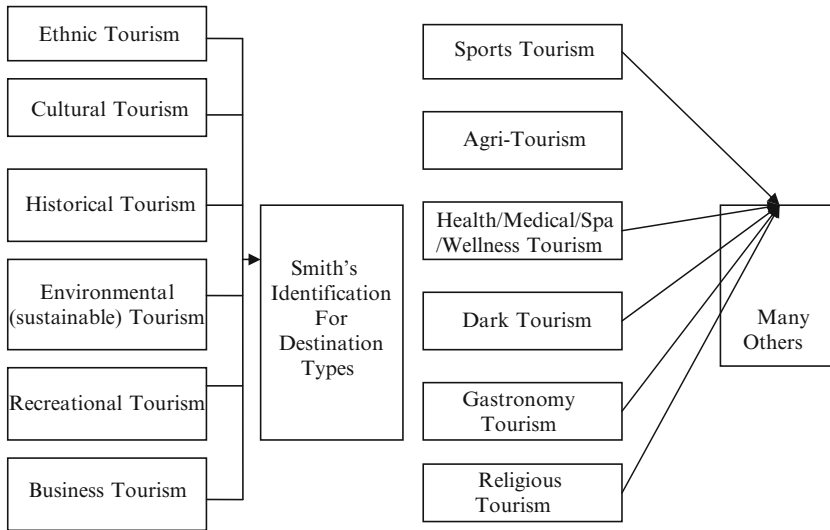
Tourism destinations have been analyzed and researched by many criteria including expectations, motivations, perceptions, competitiveness, tourist satisfaction, attractiveness, and demand perspectives (Reisinger et al. 2009:239); thus, the concept of tourism destination may be considered as the “sense of place” for tourists where they want to visit, though in the mind of tourists the “place” may vary from a huge continent to an island or even a heritage building (Holloway 2004:430). For example, the continent “Australia” may be a destination for a tourist, yet for another who is traveling in the same tour package, the city “Sydney” could be the travel destination but not Australia.

As stated before, there are many different definitions for tourism destinations since they have a complex structure. According to the classical approach, tourism destinations are well-defined geographic areas (content is shown in Fig. 31.1), though this approach of identifying and defining



Adapted from: Yavuz M.C., (2007), Uluslararası Destinasyon Markası Oluşturulmasında Kimlik Geliştirme Süreci: Adana Örneği, Yayınlanmamış Doktora Tezi, Çukurova Üniversitesi Sosyal Bilimler Enstitüsü, Türkiye: 37-38.
Nykiel R.A. (1989), *Marketing in the Hospitality Industry*, Van Nostrand Reinhold:13.

Fig. 31.1 Classical definition and differentiation for tourism destinations (Adapted from: Yavuz (2007:37–38) and Nykiel (1989:13))



Adapted from: Davidoff P.G., Davidoff D.S. & Eyre J.D., (1988). *Tourism Geography*, National Publishers, 17–21; McIntosh R., Goeldner C.R. & Ritchie B.J.R., (1995). *Tourism: Principles, Practices, Philosophies*, 7th edition, Canada: Wiley, 197–200; Özdemir G. (2008). *Destinasyon Pazarlaması*, Ankara: Detay Yayıncılık, 4–5.

Fig. 31.2 Classification of tourism destinations based on tourist experiences and attractions (Adapted from: Davidoff et al. (1988:17–21), McIntosh et al. (1995:197–200), and Özdemir (2008:4–5))

destinations is not necessarily enough to explain the complex system of the tourism nature involving the demand and supply factors. Similar to the example shown in Fig. 31.1, the tourist destinations may be classified according to four criteria as stated below (İçöz et al. 2009:11):

1. Central metropolitan city destinations: These destinations obtain huge transportation networks; they are both mass tourist sender regions and as by themselves tourist receiver destinations like New York, Paris, London, Munich, and Istanbul.
2. City destinations: Like second-tier cities, these are less populated areas with considerable tourist flows, like Boston and Izmir.
3. Rural environmental destinations: These are the areas with attractions like scenery which are widely distributed geographically.
4. Natural environmental destinations: These are areas far away from tourist sender destinations with little population density. Their economies are mainly dependent on tourism, like many islands.

Today, the spatial and characteristic diversity has become so enormous and the tourism destinations contents got so complex that the geographic classification becomes deficient to cover all the aspects involved in a destination. To overcome this deficiency, some researchers provided systematic differentiation among destinations based on the different types of travel experiences the destinations offer, leading to discussions on travel motivations of the tourists (McIntosh et al. 1995:197; Powers and Borrows 1999:410; Burton 1995:1). Within this regard, Smith (McIntosh et al. 1995:197) identified six categories of tourism where a classification of destinations may be developed relying on the tourism experience and motivations of the tourists. Today, this categorization is expanded further (Hussein and Saç 2008:9; Hacıoğlu and Avcıkurt 2007:6). Figure 31.2 shows the classification of tourism destinations based on Smith's categories and additional new ones.

Table 31.1 Tourism destination's appeal factors and attributes that lead to tourist experiences

Destination appeal and experiences offered are shaped by	Attractions (examples for notable ones) May provide initial motivation
Accessibility, ease of access	Unique landscape and scenery
Reasonable price, high perceived value for quality	Built heritage/special cultural and historic facilities
Image and character (identity/personality of the destination)	Distinctive culture, special food, and drink
Qualified human resources and good communication (a well-trained tourism workforce and citizens)	A clean, safe environment
Amenities	Distinctive architecture Iconic buildings like Eiffel Tower
Attractions: public and private	Hosting spectacular international events (like Olympics) Interesting accommodation like boutique or thematic hotels, e.g., Ice hotel Convenient shopping, famous brands Exciting night life, entertainment Interesting host lifestyle

Adapted from: Hussein and Saç (2008:87), WTO (2007:1), Çakıcı and Aksu (2006:3–4), Reisinger et al. (2009), and İçöz (2002:37)

To conclude, a tourism destination may be described as an image of a destination brand consisting of numerous special characteristics, differential offerings, touristic attractions, events, infrastructure, convenient transportation, necessary facilities and such (Tosun and Jenkins 1996) where a tourist cannot utilize just one benefit or motivation due to the complex structural characteristic of the tourism product and instead buys the end product called tourism destination which comprises of many geographic, economic, social, and psychological factors (Sarı and Kozak 2005:255).

Since destinations are made up of many complex ingredients, the destination choice is also affected by many factors. These factors maybe briefly grouped under two basic categories, namely “push” and “pull” factors. Push factors indicate psychological factors like values and personality as well as social factors like gender and education, and marital status. Pull factors, on the other hand, consist of destination-related dimensions like geographical structure and natural resources of the area, thus affecting the perceived destination image (Çakıcı and Harman 2007:1). According to some researchers, attractions are the primary elements of destination appeal and they may be used as the key motivators for visitation to a destination (Crouch and Ritchie 1999). In the literature survey, it is found that there are many different classification systems used for tourism resources and attractions, though a common one classifies the resources and attractions by seven major categories as: natural resources, cultural assets, special attractions, accommodation, cuisine, transportation, and safety and security (Lee and King 2006:179–197). As Table 31.1 indicates, destinations contain a number of basic elements which attract the tourist to the destination by satisfying their needs on arrival leading to meaningful experiences later.

Competitive Tourism Destination

The tourism industry is one of the world's greatest industries having an almost constant and rapid annual increase. For many years, statistics-related findings indicate that the international tourist arrivals have continued to grow – from 25 million in 1950, to 277 million in 1980, to 438 million in 1990, to 684 million in 2000, and reaching 922 million in 2008. In this regard, by 2020 international arrivals are expected to reach 1.6 billion (WTO 2009:2). Though global tourism numbers in

arrivals and receipts are increasing at a constant annual rate since the 1950s, it is obvious that all destinations competing in the industry cannot get the same share from this increase. As of today, competition became very severe and the ones which apply creative and effective destination management and marketing strategies seem to have a chance even in times of crisis with negative growth rates (Genç and Pınar). As an example, “despite the general deceleration in 2008, several destinations around the world showed very positive results in all world regions, – notably Honduras, Nicaragua, Panama, Uruguay, the Republic of Korea, Macao (China), Indonesia, India, Egypt, Lebanon, Jordan, Morocco and Turkey” (Tore 2009). It was indicated that the reason for these positive results lie in these destinations’ differential advantage like suitable price compared to other competitors or the power of competitiveness they have like having a unique heritage site and marketing it properly.

The differential advantages of destinations give rise to the topic of destination competitiveness of tourism which is becoming popular especially among countries that rely heavily on tourism (Tsai et al. 2009:524). Destinations’ competitiveness is studied by many researchers like Ritchie and Crouch (1993), Pearce (1997), Ritchie and Crouch (2000), Dwyer and Kim (2003), and Enright and Newton (2004, 2005), and to measure the competitiveness of a destination relative to others many different indexes, comparison models, or variables have been used.

Definition of Competitiveness

“Competitiveness is now widely accepted as the most important factor determining the long term success of destinations since 70% of all tourists visit the ten major world tourist destinations, leaving the rest of the world sharing the remaining 30% of tourists” (Vengesai 2003:637). Literature review on destination competitiveness is endless, but it seems that there is a universally accepted common and clear definition or model explaining tourism destinations’ competitiveness as a whole (Omerzel 2006:169). Researchers and academicians working on competitiveness use various definitions on destination competitiveness, where common ones are stated below:

- Competitiveness is the central point of tourism policy considering it from the economic, sociocultural, and environmental dimensions of the destinations (Gruescu 2009:198).
- Destination competitiveness is a multidimensional concept, directly linked with the destinations’ offers that are delivered better than competitors where high-quality products and services are rendered (Terzibasoglu 2007).
- Destination competitiveness relies on “the amalgam of high quality individual tourism products and unique experience opportunities that combine to form a total experience of the area visited” (Murphy et al. 2000).
- Destination competitiveness is a “multidimensional concept for destinations that requires superiority in several aspects” (Gürsoy et al. 2009:154).
- “A destination is competitive if it can attract and satisfy potential tourists and this competitiveness is determined both by tourism-specific factors and by a much wider range of factors that influence the tourism service providers” (Enright and Newton 2004:778).
- Destination competitiveness “is its ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors. A destination can be said to be competitive if its market share, measured by visitor numbers and financial returns are increasing” (Hassan 2000).

It is clear that the destination competitiveness definitions cover measures of economic, organizational, marketing, and sustainability issues (Anastassopoulos and Patsouratis 2004:65) which

are also directly related with quality-of-life indicators related with destination management. An interesting destinations' competitiveness definition is quoted from Estevao and Ferreira's study, as mentioned by Sylva in 2004, which mentions that, "the touristic competitiveness is achieved on the local destination scope, through a renewed capacity for innovation and constant improvement, rising, growing and maintaining within the touristic set" (Ferreira and Estevao 2009:10).

It is obvious that the relative competitiveness and superior aspects of a tourism destination positively impacts the numbers in terms of tourism receipts and expenditures, but also indirectly affects the tourism-related other businesses; thus, this competitiveness depending on the sustainability and consistency of the destination's resources, attractions, attributes, and eventually the recycling ability benefits all parties involved (Dwyer and Kim 2003). Crouch and Ritchie have identified many internal and external factors in an economy affecting the destinations' standard of living which are quite dependent to all the industries' competitiveness, as tourism being one of them (Crouch and Ritchie 1999). The coordination and suitable combination of attributes and attractions of the destination are important factors in destinations' competitiveness (Sarı and Kozak 2005:254–255). In the same manner, Buhalis states that tourism destinations should work on their competitive differential advantages, communicate them to their target markets, and develop partnerships among the public and private sectors in order to be competitive and optimize its benefits (Buhalis 2000).

Crouch and Ritchie (1999) were the pioneers to study the nature and structure of destination competitiveness. Their conceptual model (Ritchie and Geoffrey 2003) comprises factors of destination competitiveness that are represented and clustered into five main groups and comprising 36 destination competitiveness attributes in total being (Crouch 2006):

- Qualifying and amplifying determinants: location, safety/security, cost/value, interdependencies, awareness/image, and carrying capacity
- Destination policy, planning, and development: system development, values, vision, positioning/branding, development, and competitive/collaborative analysis
- Destination management: organization, marketing, quality of service/experience, information/research, human resources development, finance and venture capital, visitor management, resource stewardship, and crisis management
- Core resource and attractions: philosophy and climate, culture and history, mix of activities, special events, entertainment, superstructure, and market ties
- Supporting factors and resources: infrastructure, accessibility, facilitating resources, hospitality, enterprise, and political will

In the study conducted by Crouch, 10 of the 36 destination competitiveness attributes were found to have attribute-determinant measures significantly greater than average. In descending order of significance, these are: physiographic and climate, culture and history, mix of activities, tourism superstructure, awareness/image, special events, entertainment, infrastructure, accessibility, and positioning/branding (Crouch 2008).

Also, a model of TDCA and index named TTCI are used to measure tourism destinations' competitiveness which is briefly described below.

The WEF Travel and Tourism Competitiveness Index

The most recent contribution to destination competitiveness is the usage of index derived at the World Economic Forum (WEF) which is named as Travel and Tourism Competitiveness Index (TTCI) (WEF 2007). Travel and Tourism Competitiveness Index (TTCI) indicates the drivers of destinations' competitiveness and the challenges of the tourism industry at the present time

(Das and Di Rienzo 2009). The aim of the Travel and Tourism Competitiveness Index (TTCI) is to provide a comprehensive strategic tool for measuring the factors and policies that make a destination attractive to international tourists (Tsai et al. 2009:530)

The rankings based on the Travel and Tourism Competitiveness Index (TTCI), which measures the different regulatory and business-related issues that have been identified as levers for improving travel and tourism competitiveness in countries around the world which is composed of a 14 “pillars” of T&T competitiveness, are stated below (Tsai et al. 2009:530):

- Policy rules and regulations
- Environmental regulation
- Safety and security
- Health and hygiene
- Prioritization of travel and tourism (T&T)
- Air transport infrastructure
- Ground transport infrastructure
- Tourism infrastructure
- Information and communication technology (ICT infrastructure)
- Price competitiveness in the T&T industry
- Human resources
- Affinity for travel and tourism (T&T)
- National tourism perception
- Natural and cultural resources

These factors have also been considered by researchers in destination competitiveness studies.

Competitiveness perceptions differ in the sense that one views destinations from the tourist perspective (attractiveness), and the other from the destination perspective (competitiveness). Dual analyses of these two concepts provide a holistic perspective of the Tourist Destination Competitiveness and Attractiveness (TDCA) dynamics. “TDCA is defined as the ability of a destination to provide social, physical and economic benefits to the destination population as well as a satisfying experience to the tourist. The TDCA model proposes that destination supply factors and tourist demand factors help in creating an environment in which tourism flourish and can be consumed satisfactorily. The ‘destination experience environment’ is proposed to be positively related to and as the most important factor in determining TDCA” (Vengesai 2003:639). Ernie also suggests that “in the dynamically changing environment, a competitive destination is aided by the development of innovative tourism services and experiences” (Ernie 2003).

Destination Competitiveness and Quality-of-Life (QOL)

Both destination competitiveness and QOL are updated topics studied by many researches in various academic and practical fields. When these topics are studied together, in respect to their impact on another, it is indicated by some researchers that there seems to be a direct relation between the factors of destination competitiveness and quality-of-life issues. It is mentioned by Milohnić and Jurdana that “the general aim of tourist destination competitiveness strategy is the increase of life quality thus quality becomes a key element of tourist destination competitiveness. Therefore, all elements of tourist offer should offer the highest possible level of quality in the segment of the tourist product specificity which they have offered in the market” (Milohnić and Jurdana 2008). It is also quoted in Dwyer and Kim’s work that “regardless of the specific definitions offered, the notion of competitiveness does, however, appear to be centered on human development, growth

and improved quality-of-life since for a company, competitiveness means the creation of new growth options that create value for shareholders and for a society, improved competitiveness translates into new jobs and better living conditions” (Dwyer and Kim 2003:372).

Taking into account the destinations offerings, products, and services, it is proper for destinations to communicate the important competitive factors to their target market. Thus, these factors may be briefly stated as: built and cultural attractions which are the motivators for the visit, amenities which include basic infrastructure such as utilities and roads and direct services and accommodation, food and beverage (F&B) and shopping facilities, the image, the attributes attractive to target group, unique qualifications, time and age characteristic with heritage, sustainability, service quality, and perceived price/quality ratio (Usta 2008:224–225). In addition, safe holiday concept is one of the indispensable elements of tourism. Today, safety is rated as one of the first properties that tourists look for in a holiday venue (Seçilmiş 2009:152).

Though competitiveness goes hand in hand with issues of attractiveness, sustainability, image, accessibility, attractiveness, safety are not only important indicators for destinations’ quality-of-life but also they are highly related with competitiveness. Thus, they are measured generally in terms of their economic contribution to the destination (Ruhanen 2007). Development and competitiveness are stressed as the most important parameters of economy progress improvement where development includes the increase of employment rate, production, property value, and new investments, while competitiveness covers issues covered by 14 pillars stated in TTCI as: policy rules and regulations, environmental regulation, safety and security, health and hygiene, prioritization of T&T, air transport infrastructure, ground transport infrastructure, tourism infrastructure development, information and communication technology infrastructure, price competitiveness, human resources, affinity for travel and tourism, national tourism perception, and natural and cultural resources (Tsai et al. 2009:530).

This effect may be concentrated since destination environmental competitiveness can be increased by appropriate managerial efforts related to environmental impact (EI) and environmental quality (EQ) management. Second, the destination competitiveness can be enhanced through certain environmental marketing activities (Mihali 2000). Thus, as a destination becomes popular as a tourism destination, it becomes a powerful force for social well-being, creating employment and wealth, and understanding of other cultures which contribute to the quality-of-life of locals in an improving way. In addition, these positive impacts of tourism destination’s development on quality-of-life of locals may be improved by the development strategies like capacity building programs, educating the locals, making them feel pride in their culture, ensuring better host-guest understanding, reducing economic leakages, various training programs, etc. (Chauhan and Khanna 2009:50–56).

Destination Marketing and Destination Management

Destination marketing aims to communicate the destinations’ personality and image to the target markets at the right time, right place, and at the right timing (Yavuz 2007). Thus, the image of the destinations may have multiple dimensions since there are so many factors that affect the tourism destinations demand and supply as mentioned previously. Environments that have unique cultural sites, heritage sites, natural beauties, nice climate, museums, sustainability, high service quality, interesting local arts and heritage, unique geography, and cultural history are all potentially rewarded destinations for tourists. With the new trend in destination management and the changing role of destination management organizations, the promotional and developing efforts for destination are maximized with additional benefits of gained synergy (Genç and Pınar 2008:128;

Wang 2008). This is a hard job though, since destinations attempt to build loyalty and repeat visitation is considered highly complex, fragmented, and difficult to manage (Fyall et al. 2003).

The image may also be classified in two parts, one being the basic image whereas the second one could be the special image of the destination. (Özdemir and Karaca 2009:118). The basic image may be based on factors such as recreational activities, general infrastructure of the destination, transport and such, whereas the special image may be based on historical, cultural, political, social, financial, climatic, and natural resources of the region. If these factors may be put in an image package of the destination and communicated to the suitable market, it may be used to affect the choice decisions of the potential customers.

Destination management plays a key role in marketing, competitiveness, and development since destinations present complex challenges for management and development in that they must serve a range of needs of tourists and tourism-related businesses as well as the resident community, local businesses, and industries (Semerciöz et al. 2008:90). The management and development of destinations and the tourist experience involves many aspects, including the ones stated below (Ndlovu 2009:28–29; Doğanlı 2006:87):

- Coordinating the tourism services and facilities for visitors
- Increasing competitiveness
- Marketing (all marketing mix elements) of tourism and tourism services
- The provision and dissemination of destination information
- Managing the offered tourism product and services (mix of lodging, F&B, entertainment, attractions, attributes, etc.)
- Maintaining and improving the skills, training, and quality of tourism service providers
- Creating new tourism product types
- To find out new target markets
- Establishing destination marketing system (DMS) which is the internationally acknowledged advanced thinking on development of travel information at present which is vital to both of the development of regional travel industry and international marketing (Wei and Jiu-Wei 2009:1)

The role of destination management organizations and destination marketing organization in the destinations marketability is vital (Ndlovu 2009:28). Destination management organizations have all the necessary information about the defined destination, and by integrating and coordinating all the related accommodation, transportation, entertainment, F&B establishments, and technical support, they not only support and manage to build up the image and brand of the destination but also help to promote and communicate it to the target groups and consumers (Tavmergen and Aksakal 2004:76; Genç and Pınar 2008). DMOs have played a leading role in tourism development for many years now which may be briefly described as any organization at any level that manages the promotion and marketing of an identifiable region or destination. DMOs may include national tourism offices (NTOs), state tourism offices (STOs), regional tourism offices (RTOs), and convention and visitors bureaus (CVBs) and generally falling into one of the following categories (Presenza et al. 2005):

- National tourism authorities or organizations, responsible for management and marketing of tourism at a national level
- Regional, provincial, or state DMOs, responsible for the management and/or marketing of tourism in a geographic region defined for that purpose, sometimes, but not always, an administrative or local government region such as a county, state, or province
- Local DMOs, responsible for the management and/or marketing of tourism based on a smaller geographic area or city/town

It is important to stress that the main aim of DMOs is enhancing sustained destination competitiveness. The World Tourism Organization (2004) defines DMOs as the organizations responsible for the management and/or marketing of destinations.

The Concept and the Definition of Quality-of-Life (QOL)

Today, the quality-of-life is very popular and researched in many scientific and academic fields. In sociology, quality-of-life is a subjective issue dealing with understanding of well-being. In economics, it covers the overall increase in purchasing power, standard of living, costs, etc., whereas in health it deals with prevention of illnesses, increasing average lifetimes of populations, and giving information about healthy lifestyle trends and habits. Philosophers and theologians study quality-of-life also for their own purposes.

Though quality-of-life consists of many factors regarding all the different fields, it is researched which impact the social, environmental, medical, and economic well-being of the residents; as a concept, it is very subjective since it depends on the values and beliefs of different researchers, analysts from various fields, etc., and is often heavily influenced by varying comparisons with similar people in similar circumstances.

The concept of “quality-of-life” was introduced in 1975 as a key term in medical indexes and in the early 1980s took place in systematic researches (Berlim and Fleck 2003:249). More recently, QOL concept became common for many researchers in many different academic fields where the content, definition, and measurement varied a lot from field to field. Since it is associated with different issues like health or happiness or human development, quality-of-life still lacks a universally accepted definition (Susniene and Jurkauskas 2009:59). The most commonly accepted comprehensive definition is related with health where in 1991, a panel of researchers of the World Health Organization (WHO) defined QOL as “the individual’s perception of his or her position in life, within the cultural context and value system he or she lives in, and in relation to his or her goals, expectations, parameters and social relations” (World Health Organization Quality-of-Life (WHOQOL) Group 1998). Though accepted in general as a common definition, all researchers do not use this definition for QOL, e.g., happiness perspective researchers use “Gross National Happiness (GNH) which is a definition of quality-of-life in holistic approach emerged with Jigme Shingye Wangchuck (Wangchuck) in 1972, building an economy that would serve Buddhist spiritual values where the four pillars are; the promotion of equitable and sustainable socio-economic development, preservation and promotion of cultural values, conservation of the natural environment, and establishment of good governance” (Lepage <http://www.ep.liu.se/ecp/026/081/ecp0726081.pdf>). Table 31.2 gathers all the concepts and definitions related with QOL and gives examples for each of them.

As a conclusion of the whole aspects for QOL concept, four qualities of life is derived by Ruut Veenhoven, as shown in fourfold matrix figure below where the distinction between chances and results is presented vertically, and the difference between outer and inner qualities horizontally (Table 31.3).

The scheme below is derived when the four qualities of life is adapted for the Cummins’ (1993) Comprehensive Quality-of-Life Scale classification consisting of seven domains which are: material well-being, health, productivity, intimacy, safety, place in community, and emotional well-being (Table 31.4).

Table 31.2 QOL-defined concepts and examples

QOL concepts	Definition and examples
1. Rights	Access or entry into generic services Contracts, etc.
2. Relationships	Friends, family, social interactions at home, work, or in community Upgrading of local cultural facilities
3. Satisfaction	Feelings of well-being and motivation about home, work, leisure, friendships, appearance, status, choices
4. Environment	Regional conservation efforts Protect and enhance the natural and built environment
5. Economic security and well-being	Possession of commodities, which include services, wages, social security systems Standard of living
6. Social inclusion	Rich social interactions in the area Status and roles that include one in the social networks of home, work, community
7. Individual control	Having control over activities in home, work, community
8. Privacy	Individual control over spaces and property Individual control over individual's own private life
9. Health	Better services for ill people and disability, better nutrition, preventive medical procedures, better health care services
10. Growth and development contracts (shops, parks, marriage, etc.)	Availability of opportunities for the attainment of personal goals, hopes, or aspirations; development of skills to live independently, work competitively, and utilize community services

Adapted from: Keith et al. (1996)

Table 31.3 Some submeaning within quality quadrants (*Adapted from:* Veenhoven 2000)

	<i>Outer qualities - the quality is in the environment,</i>	<i>Inner qualities - is in the individual</i>
<i>Life chances - opportunities for a good life</i>	Livability of environment <ul style="list-style-type: none"> ● Ecological e.g. suitable climate, clean nature. ● Social e.g. freedom, equality. ● Economical e.g. High GNP, developed social security, ● Cultural e.g. flourishing of arts and sciences 	Life-ability of the person <ul style="list-style-type: none"> ● Physical health e.g. energetic, good health ● Knowledge e.g. literacy ● Skills e.g. intelligence, manners, capabilities ● Art of living e.g. unique lifestyle
<i>Life results - good life itself</i>	Objective utility of life <ul style="list-style-type: none"> ● External utility e.g. For intimates: rearing children, care for friends e.g. For society: being a good citizen, e.g. for mankind: leaving an invention, being a good human 	Subjective appreciation of life <ul style="list-style-type: none"> ● appraisal of life-aspects e.g. Satisfaction with job e.g. satisfaction with variety Prevailing moods e.g. Depression Overall appraisals Affective: general mood-level Cognitive: contentment with life

Adapted from: Veenhoven (2000)

Table 31.4 Quality-quadrants adapted from Cummins' (1993)

	<i>Outer qualities - the quality is in the environment,</i>	<i>Inner qualities - is in the individual</i>
<i>Life chances - opportunities for a good life</i>	Income, possessions Social contacts, networks Social position Social groups Opportunities	Health Productivity Autonomy
<i>Life results - good life itself</i>	(Productivity) (Social responsibility)	Satisfaction through: Material life Social contacts Social position Safety Freedom

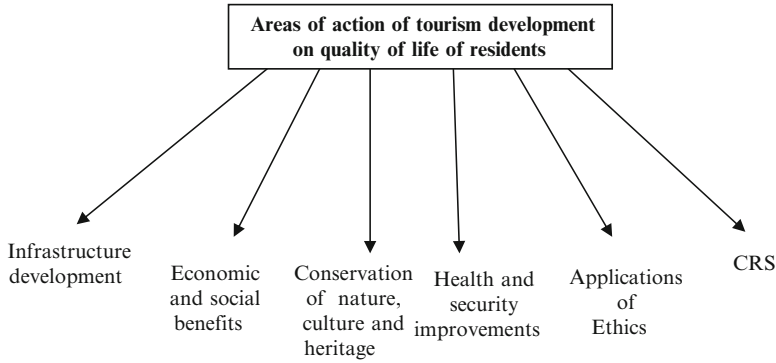
Tourism and Quality-of-Life

Many studies indicate that there seems to be a direct relationship between the tourism development of a region and quality-of-life of the residents of the host destination (Cohen 1979; Jones 1990:4; Kim 2002:229; Gill and Curiel 2008:420; Enea and Tanasoiu 2009:350; Mang et al. 2010:165); tourism development in the destination within the carrying capacities of supporting ecosystems positively impacts quality-of-life of the residents (Levett and McNally 2003:53). The economic benefits are obvious, like impact of tourism on jobs creation, income, or local tax revenue generation. It was stated in the “tourism destination management strategies for greater phnom penh, siem reap and potoch village” ADP-funded project that “the community views tourism as an opportunity for additional income and employment and as better quality-of-life” (Padeco Co 2001:24). Thus, many quality-of-life indicators are very much related to destinations’ promoted special tourism types such as ecotourism, culture tourism, heritage tourism, religious tourism, soft tourism, bird-watching, and sustainable tourism (Padeco Co 2001:24; Tapper 2006:7; Gill and Curiel 2008:420). For example, sustainable tourism includes various aspects of development such as human development, gender equality, and overall quality-of-life issues; thus, application of it positively impacts quality-of-life indicators of the residents. Also, the interaction of tourists and the locals in their visits was found to develop the quality-of-life of the residents, especially these trips, are made for cultural, sustainable, and/or religious purposes (Gill and Curiel 2008:421; UN 2001:54). In addition, it was found in another project that tourism-related infrastructure in various parts of the country has improved the quality-of-life for local people and helped promote local arts and crafts (UN 2001:59).

Bohdanowicz and Zientara (2009) indicated that tourism development in an area has impacts on quality-of-life of the residents since the tourism and hospitality firms emphasize corporate social responsibility (CSR)-driven initiatives, thus having a considerable effect on a host community’s socioeconomic situation. By CSR applications, issues like “dealing fairly with employees, suppliers and customers, and, on the other, on supporting local communities, donating to charitable causes and promoting environmental sustainability” become significant and important (Bohdanowicz and Zientara 2009:148–149) (Fig. 31.3).

Discussion and Conclusion

The tourism industry is a very competitive industry for destinations which is made of very specialized consumers who look for the image and prestige in the products and services that they buy (Genç and Pirnar 2008:129). Thus, destinations are made up of many factors; they are made



Adapted from: Enea C. & Tanasoiu G. "The Impact of Tourism in Enhancing the Quality of Life", *Review of International Comparative Management*, 10(2), May 2009.

Fig. 31.3 Tourism and QOL (Adapted from: Enea and Tanasoiu 2009)

up of complex structures and systems of flows which interact and constantly change. They consist of mixture of tangible and intangible products, services, images, and experiences and all the pull factors like attractions that the area visited offers, a set of core and supplemental benefits like infrastructure, destination management, and marketing applications and superstructure that the area provides to the visitors and the image and the perceived value they offer to the visitors.

It appears that there is a direct connection between the factors of destination competitiveness and quality-of-life issues. It is also quoted in Dwyer and Kim's study that "regardless of the specific definitions offered, the notion of competitiveness does, however, appear to be centered on human development, growth and improved quality-of-life since for a company, competitiveness means the creation of new growth options that create value for shareholders and for a society, improved competitiveness translates into new jobs and better living conditions" (Dwyer and Kim 2003:372). Thus, the important competitive factors for destinations to communicate to their target market may be stated as: built and cultural attractions which are the motivators for the visit, amenities which include basic infrastructure such as utilities and roads and direct services and accommodation, F&B and shopping facilities, the image, the attributes attractive to target group, unique qualifications, time and age characteristic with heritage, sustainability, service quality, and perceived price/quality ratio (Usta 2008:224–225).

The studies related to destination management and quality-of-life usually are focused on the relationship between destination management/destination competitiveness (some attributes or competitiveness index factors) and quality-of-life of locals. For example, research conducted by the Institute of Destination Architects and Designers referenced understanding human happiness and how destination/environment can affect QOL as a basis. It is suggested that "when investigating happiness, QOL researchers have followed some lines of reasoning that could be traced for the purposes of understanding successful destinations since the very basis for competition among destinations in the travel industry is that there are "better" attributes to be found in one place than another. The thrust of travel for leisure purposes depends on the notion that some place other than a person's home surroundings has the capacity to enrich one's life, provide new insight or create memorable experiences" (Institute of Destination Architects and Designers 2002).

Table 31.5 below shows the determinants of quality-of-life factors on the left column against the travel and tourism competitiveness index factors on the right column, and as can be seen from the comparison, some of these factors are very much relevant which were placed just next to the right column.

Table 31.5 Determinants of QOL factors associated with Tourism Competitiveness Index factors

The nine quality-of-life factors	TTCI
1. Material well-being	6. Air transport infrastructure 7. Ground transport infrastructure 8. Tourism infrastructure 9. Information and communication technology (ICT) infrastructure 10. Price competitiveness in the T&T industry
2. Health	3. Safety and security 4. Health and hygiene
3. Political stability and security	1. Policy rules and regulations 2. Environmental regulation 5. Prioritization of travel and tourism (T&T)
4. Family life	
5. Community life	12. Affinity for travel and tourism (T&T) 13. National tourism perception
6. Climate and geography	14. Natural and cultural resources
7. Job security	11. Human resources
8. Political freedom	
9. Gender equality	

Adapted from: EIU (2005) and Tsai et al. (2009)

Tourism destinations are in a very severe competition, and it seems that the ones with differential advantages and unique offerings can stand out from the crowd by either keeping or even increasing their market share. The competitive differential advantage for destinations seems to lie in the issues of: sustainable development in the long term, balancing the different attractions and attributes, ensuing quality-of-life of the locals, and differentiating the economic base (Paskaleva-Shapira 2005:148–154). Thus, it seems that the destination competitiveness and the residents' quality-of-life issues positively impact each other, such that improvement in one usually affects the other in the same manner.

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Chapter 32

Community Participation in Tourism Planning and Development

Amir Shani and Abraham Pizam

Introduction

Although the concept of Quality-of-Life (QOL) has become a buzzword in many fields, it is still a complex and subjective term with an abundance of definitions and models. Most, however, agree that QOL should be defined autonomously by the individuals to whom it refers, rather than determined by external forces such as governmental bodies or elite members of society. For example, Andereck et al. (2007) stated that QOL “refers to one’s satisfaction with life, and feelings of contentment or fulfillment with one’s experience in the world. It is how people view, or what they feel about, their lives” (p. 484). The self-determination of a person or a community regarding their QOL state and its influential factors is also reflected in Moscardo’s account that “QOL is concerned with understanding people’s perceived satisfaction with the circumstances in which they live” (2009, p. 162).

Consequently, the popularity of QOL points not only to the transformation from merely economic indicators as a measurement of well-being to more holistic views that also include social and cultural perspectives. It also stresses the significance of having the people themselves define the critical subject matters and gaining their perspective on these issues, as what people find important varies from person to person (Farquhar 1995; Felce and Perry 1995). In the words of Hofstede (1984), “What people see as the meaning of their lives and the kind of living they consider desirable or undesirable are matters of personal choice par excellence” (p. 389).

In light of these well-accepted understandings of QOL, it is clear that when this concept is applied to sustainable tourism development, the participation of community members in any planning process becomes a pivotal issue. As noted by Getz and Timur (2005), a central component of the sustainable tourism philosophy is the stakeholder theory. When this theory is applied within the context of tourism, it asserts that the interests of all those who may affect or may be affected by tourism development should be granted genuine consideration. In the case of conflict

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of interests between different stakeholders, the optimal balance between them should be sought during the decision-making process (Hasnas 1998; Ogden and Watson 1999). The determination of the stakeholder groups involved or affected by tourism development may at times reveal incongruity and/or debate between groups. However, there is a unanimous agreement that the most critical stakeholders that should be considered in the tourism planning literature are the local residents (deAraujo and Bramwell 1999; Sautter and Leisen 1999).

Since the local residents are likely to experience the greatest impact from such developments, informing them of relevant aspects, considering their views, involving them in different stages in the decision-making process, and ensuring that they gain actual benefits are advocated and promoted by many as fundamental to sustainable tourism. The process of taking the host community's perspective into account can be seen as a means of balancing the needs of the local residents with those of other prominent stakeholders such as tourism developers, businesses, environmental groups, and municipal and governmental authorities (Tosun 2000; Williams and Lawson 2001).

To illustrate, reviewing sets of sustainability principles for tourism planning and management, McKercher (2003) highlighted that developers should actively work in partnership with local leaders and minority groups to ensure that the community retains control over tourism development. Indeed, the involvement of local residents in the planning process and having a resident advisory board emerged as important sustainability indicators for measuring community tourism development (Choi and Sirakaya 2006). For example, Tosun (2001) argued that one of the main challenges for sustainable tourism development in Turkey is its central public administration system, which prevents citizen participation in public affairs.

Concerns that have been raised by local residents, which are expected to directly and indirectly influence their QOL (in either positive or negative manners), include economic, socio-cultural, and environmental factors (Ap and Crompton 1998; Andereck and Jurowski 2005; Pizam 1978). A summary of dominant impacts of tourism is provided in Table 32.1. The argument that the considerable magnitude of these potential impacts requires that attention be paid to the views of those who are most influenced constitutes the ideological foundation of the participatory approach in tourism development. As argued by Andereck and McGehee (2008, p. 236), "it is community residents who should ultimately have a voice in determining which tourism impacts are acceptable and which are unacceptable."

Community participation (CP) techniques have been implemented and tested in many human-related projects, essentially from disciplines such as health care and urban planning. Most tourism developers are interested in involving local residents into tourism planning and management due to the distinctive nature of the tourism product, its reliance on community-based assets and resources upon which local residents have significant influence, and its considerable impacts on local residents. Nevertheless, numerous obstacles and disadvantages have been attributed to the participatory approach to tourism planning and development, which have raised doubts and criticisms regarding its usefulness and applicability (Blackstock 2005; Taylor 1995; Tosun 2001). Furthermore, the lack of democratic tradition and other fundamental factors in many developing countries has made the application of participatory techniques within communities far more complicated (Tosun 2000).

As a result of the appreciation of the difficulties and barriers associated with CP, a more pragmatic and realistic stance has emerged. This position recognizes the needs to have realistic expectations of the process, match the right participation techniques to project objectives, develop adequate procedures to overcome limitations, and be aware that the participatory approach might not always be the most suitable course of action for every circumstance. Proposing and preparing CP initiatives in either developed or developing areas requires special consideration of the heterogeneous nature of destinations and communities and their characteristics, as well as to the goals and objectives of the developmental programs themselves.

Table 32.1 Partial list of the potential impacts of tourism development

	Positive	Negative
<i>Economic impacts</i>	<ul style="list-style-type: none"> • Raises income and standard of living • Improves the local economy • Creates job opportunities • Improves investment, development, and infrastructure spending in the economy • Improves public utilities infrastructure • Improves transport infrastructure • Increases shopping opportunities 	<ul style="list-style-type: none"> • Increased costs of goods and services • Higher real estate prices • Increased costs of living/property taxes • Results in high leakage effect • Highly influenced by seasonality • Leads to extraneous dependency
<i>Environmental impacts</i>	<ul style="list-style-type: none"> • Preservation of the natural environment/non-consumptive development form • Preservation of cultural resources, such as historic buildings and monuments • Improvement of the area's appearance 	<ul style="list-style-type: none"> • Increased traffic congestion • Overcrowding • Increases noise pollution and litter • Creates visual pollution • Deterioration of sensitive natural environments
<i>Social/cultural impacts</i>	<ul style="list-style-type: none"> • Improves residents' quality-of-life • Increases availability of recreation facilities/opportunities • Improves quality of governmental services (e.g., police and fire protection) • Improves image and understanding of different communities and cultures • Promotes cultural exchange • Preserves cultural identity of host community 	<ul style="list-style-type: none"> • Commercialized local traditions and cultures • Increased prostitution • Increased alcoholism • Increased crime • Drastic change in lifestyle and community life • Conflicts and resentment between locals and tourists • Generates stereotypes and xenophobia

Source: Ap and Crompton (1998), Goeldner and Ritchie (2006), and Pizam (1978)

The current chapter discusses the role of CP in supporting the link between tourism development and QOL while elaborating on the advantages and challenges of this approach. Description of several participation techniques to achieve different goals is provided, along with suggestions for overcoming obstacles and constraints. The chapter ends with proposals for improving future tourism planning and implementation, conclusions, and suggestions for future research.

Background and Definitions

The idea to involve and consult residents in formulating policies emerged in the 1950s and is rooted in Western values of direct political democracy that stress they should have the ability to influence decisions that can affect their lives (Abbott 1995; Taylor 1995). Irvin and Stansbury (2004) explained that the fundamental supposition in integrating CP programs is that the active involvement of citizens in public life strengthens the democracy and generates more effective government. Nevertheless, there has been extensive disagreement as to the definition of the term CP, resulting from the various purposes for which it has been used. CP has appeared in the general literature in variety of terms and phrases, such as citizen participation, citizen involvement, consumer participation, consensus seeking, community involvement, community control,

Table 32.2 Selective definitions of community participation^a

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- (Citizen participation) is the redistribution of power that enables the have-not citizens, presently excluded from the political and economic processes, to deliberately included in the future (Arnstein 1969, p. 216)
 - (Public participation is) the means by which people who are not elected or appointed officials of agencies and of government influence decisions about programs and policies which affect their lives (Brager and Specht 1973, p. 47)
 - (Citizen participation) is defined simply as providing citizens with opportunities to take part in governmental decision or planning processes (Glass 1979, p. 181)
 - Community participation may be thought of as an instrument of empowerment. According to this view, development should lead to a equitable sharing of power and a higher level of people's, in particular the weaker groups', political awareness and strengths (Samuel 1986, p. 46)
 - (Community participation is) an educational and empowering process in which people, in partnership with those able to assist them, identify problems and needs and increasingly assume responsibility themselves to plan, manage, control, and assess the collective actions that are proved necessary (Askew et al. 1986, p. 5)
 - Community participation in tourism planning is the process of involving all relevant and interested parties (local government officials, local citizens, architects, developers, business people, and planners) in such a way that decision making is shared (Haywood 1988, p. 105)
 - Community participation is a social process whereby specific groups with shared needs living in a defined geographic area actively pursue identification of their needs, take decisions and establish mechanisms to meet their needs (Rifkin et al. 1988, p. 931)
 - (Citizen participation is) the social process of taking part (voluntarily) in formal or informal activities, programs and/or discussions to bring about a planned change or improvement in community life, services and/or resources (Bracht and Tsouros 1990, p. 110)
 - Community participation, as an ideal type, involves a shift of power, from those who has major scission-making roles to those who traditionally have not had such a role (Willis 1995, p. 212)
 - (Community participation) means that the opinions and needs of the community are given careful consideration during the process of decision-making, tourism development, planning, management and supervision (Sun and Bao 2006, p. 137)
-

^a“Community Participation” is also referred to in many definitions as “Citizen Participation” or “Public Participation”

community partnership, and more (Bracht and Tsouros 1990). Specifically in the tourism literature among the related terms that have been referred to are community tourism planning, community-based tourism, participatory tourism planning, and sustainable community tourism (Jamal and Getz 1995; Reed 1997).

Despite the abundance of terms used to describe the phenomenon, Timothy (1999) stated that CP in tourism can be viewed from two main perspectives: (1) participation of the public in benefits generated from tourism development and (2) participation of the public in the decision-making process throughout the tourism planning and development process. While the focus of the chapter is the second perspective, it should be noted that the two are often regarded as interrelated. In fact, one of the central objectives of involving community members in tourism planning is to maximize their share in the development benefits, which can potentially enhance their QOL. For example, Bamberger (1986) suggested that “community participation may help ensure the more equitable distribution of benefits and may ensure that politically or economically weak groups may have access to the project services and benefits” (p. 10). As will be discussed later in the chapter, other justifications have dominated the rationale in applying participatory techniques, not all of them having the best interest of the community as their top priority.

While many definitions of CP appear in the literature (see Table 32.2), a useful definition of CP that is QOL oriented and links the aforementioned two perspectives is “an active process by which beneficiary or client groups influence the direction and execution of a development project with a view to enhancing their well-being in terms of income, personal growth, self-reliance or other values they cherish” (Paul 1987, p. 2). In paraphrasing Sawyer's (1995) interpretation of CP in health care, community participation in tourism development can ideally be defined as an

active process in which the community identifies its needs and works in partnership with tourism professionals and local authorities to meet its needs and enhance its QOL. More comprehensively, the general goal of community participation is

to strike a balanced and harmonious approach to development that would stress considerations such as the compatibility of various forms of tourism with other components of the local economy; the quality of development, both culturally and environmentally; and the divergent needs, interests, and potentials of the community and its inhabitants (Brohman 1996, p. 60).

Objectives of Community Participation

As noted, the objectives of CP are likely to differ between programs. A wide variety of strategies can be pursued in implementing participatory programs, and they can be generally categorized into community-oriented goals (the citizen perspective) and planning-oriented goals (the administrative perspective) (Glass 1979; Marien and Pizam 1997). In the former, the local community is seen as an end in itself, and the participatory process aims to ensure the locals' QOL in the tourism development. In the latter, on the other end, the local community is seen as a means to an end, and involving the locals in the planning process is a tool to secure the support or cooperation of the community for the successful completion of a tourism development project. It should be noted, however, that the two categories are by no means mutually exclusive, as a participatory approach can take place when both community and planning goals are perceived as essential concerns.

Community-Oriented Objectives

A variety of goals have been mentioned regarding the ability of the participatory approach to contribute to the fabric and QOL of the community. Involving residents in decision-making processes can encourage active and engaged citizenship, which strengthens residents' sense of autonomy and their ability to solve problems by themselves (Glass 1979; Tosun 2000). Moreover, the CP initiatives can assist in reducing governmental intervention when transferring the responsibility of people's life into their own hands. This goal of empowerment is designed to strengthen locals' self-reliance and trust so that they can initiate actions and influence issues that affect their lives (Paul 1987). In addition, local participants in the planning process can learn and be educated from informed official representatives, as well as develop new skills and capabilities, all which can enhance their political, social, and cultural capitals (Marzuki 2008). CP is also advocated as a lever for social equity, as it presumes to enable a more just power distribution among stakeholders (including minorities and the disfranchised) in society, which increases the fairness in the share of benefits and costs (Jago et al. 2006).

As the tourism industry is highly dependent on the physical environment, CP has been also promoted as a means to support the sustainability of the destination. As noted in various studies, the irresponsible use of natural resources often leads to deterioration of the quality of the environment while ignoring the local population and its needs (Uriely et al. 2007; Wall 2001; Wearing and Neil 1999). Thus, taking locals' perspectives into account throughout the tourism planning can balance economic development and the need for conservation when preventing the overexploitation of resources upon which the community relies.

Lastly, harsh criticism has been directed at the tourism industry with regard to cultural impacts that occur on host societies. As noted by Goeldner and Ritchie (2006), locals might feel that their

culture is held in contempt by the “folklorization” of the local tradition and the “trinketization” of craft and souvenirs, while they are faced with expeditious infrastructure, crowdedness, and a change of lifestyle. Representation of local residents and indigenous cultures in the tourism planning process can ensure that their traditional lifestyles and values remain intact and respected (Li 2006).

Planning-Oriented Objectives

Not surprisingly, CP programs are often used when the well-being of the community itself does not constitute the main drive for its implementation. The focus in these motivations is on the successful achievement of task goals, when it is recognized that local residents should be involved to some extent in executing the desired tourism development. In this view, CP is seen first and foremost as an instrument to gain the locals’ support and cooperation. Since the locals’ attitudes and behavior is an important success factor in many development programs, informing and involving them in decision making is likely to increase their commitment to the process and the likelihood of collaborating in its implementation (Mitchell 2008; Simpson 2001). Indeed, in his study on community tourism planning in the small fishing community of Cap-Pelé, located in the Canadian province of New Brunswick, Keogh (1990) found that, generally speaking, residents who were more informed and familiar with development proposals for establishing a new tourist park also expressed more favorable attitudes toward them.

Furthermore, the major attractors to tourism destination are based on assets (e.g., natural resources, cultural events, infrastructure, and superstructure), which can be accessed and developed more easily through the collaboration of the local communities (Okazaki 2008). In this regard, it should be emphasized that tourists’ experience and satisfaction is often directly related to the local residents’ attitudes and behaviors (Ap 1992; Andereck and Vogt 2000). Ensuring their cooperation and support through participation is desirable to reduce potential tension and secure hospitable behavior. Moreover, obtaining the collaboration of the local residents, while generating socioeconomic benefits for them, can provide better resilience for the tourism destination in state of crises and the instabilities with which the industry is characterized (Okazaki 2008).

The participatory approach can also provide development professionals with technical advantages. CP can assist developers to utilize the knowledge and capabilities of community members (Burke 1968; Irvin and Stansbury 2004). Since community members are often perceived as “local experts” on their surroundings, involving them in planning processes can supplement the professionals’ expertise, lead to better decisions, and consequently increase the success rate of the plan (Bamberger 1986). The involvement of local residents in planning can also offer new prospects for innovative ideas and out-of-the-box solutions (Marzuki 2008). Last but not least, the local community is a significant motivating force for preserving the natural, social, and cultural environments, the deterioration of which is a major threat to the tourism industry. As noted by Jones (1993), the community “can often provide its own environmental checks and balances” (p. 147). These above arguments indicate that CP can be useful in improving the efficiency, effectiveness, creativity, and sustainability of tourism development projects.

Types of Community Participation

Despite the popularity of CP in both public and private planning, it has been acknowledged that it has failed to serve as a panacea for all the problems that accompany development projects. While some CP initiatives have proved to be sincere in their attempts to redistribute power in

Table 32.3 Arnstein's ladder of citizen participation

Levels of participation	Characteristics
Nonparticipation	
<i>Manipulation</i>	Community members are involved in CP for the sole purpose of “educating” them, persuading them to support the plan, and using them as a public relations tool
<i>Therapy</i>	CP initiatives are staged to appease the anger and frustration of community members, but not to deal with the real problems they face or to consider their perspective
Degrees of tokenism	
<i>Informing</i>	Typically a one-way communication in which participants are informed of relevant issues regarding the development project, usually without ability to have actual influence
<i>Consultation</i>	On this rung, the participants are asked to provide feedback, yet there is no guarantee that their opinions will be accepted or even considered
<i>Placation</i>	Residents have direct access to the planning process, as they are allowed to advise or to offer alternative plans, though authority representatives still hold the right to change or reject the recommendations
Degrees of citizen power	
<i>Partnership</i>	Locals are granted some planning and decision-making accountabilities, often through negotiation and compromise between community members and power holders. This share of authority is typically imposed on authorities by frustrated citizens who were fed up with empty promises of CP
<i>Delegated power</i>	This level marks a fundamental transformation of influence to the hands of community members, as they have significant control over the decision-making process and can often ensure that the plan suits them
<i>Citizen control</i>	Citizens have the ability and authority to govern a plan and have full charge over policy making, executing, and managing the program

Source: Adopted from Arnstein (1969)

society such that benefits are fairly shared, others have been found to have other agendas, in which CP is used as lip service, or even cynically utilized to tighten authorities' power over local communities without any consideration for their QOL. Thus, there can be several stages and levels for CP, based on the extent of power distribution it exemplifies.

In one of the first acknowledgements of the heterogeneity between CP programs, Arnstein (1969) offered a hierarchical typology of CP, which ranges from the lowest degrees of power distribution – nonparticipation rungs (“therapy” and “manipulation”), degrees of tokenism (“informing,” “consultation,” and “placation”) – to the maximum extent of citizen power (“partnership,” “delegated power,” and “citizen control”) (see Table 32.3). This analysis implies that the more power is delegated to communities, the more empowered and benefited they will be, with full citizen control being the ultimate aspiration of local communities.

Arnstein's model is often used as a useful indicator of the state of CP in developing projects, including in the tourism context. For example, Okazaki (2008) examined the case study of the Palawan Province in the Philippines, which was designed and developed as an ecotourism destination. His investigation focused on a community-based tourism project conducted by the Tagbanua Foundation of Coron Island (TFCI), where the Island is one of the main tourism destinations in the region with an abundance of ecotourism qualities. The analysis revealed that the TFCI members were located at the rung of *informing* or *consultation*, while both the residents of Coron Island and Coron Town were on the *nonparticipation* rung. The researcher concluded that the findings require the promotion of information diffusion and community empowerment so that the ecotourism planning and development in the region will advance to higher participatory levels as defined in the model.

Based on Arnstein's typology (1969) and other previous works on CP, Tosun (1999, 2006) offered a classification of CP which aimed to be designed specifically for tourism development processes. His typology includes three main hierarchical stages of CP: "spontaneous participation," "induced participation," and "coercive participation." The first category stands for the ideal type of CP, a bottom-up initiative that allows direct participation in decision making and full managerial responsibility for the community. Within the second category, local citizens are often informed of relevant topics and are permitted to voice their opinions, yet the decisions are made by others, and no assurance exists that the locals' account will be taken into consideration. The last category represents the most passive type of CP, when the community is cynically manipulated through participatory programs to support tourism development projects for the sole purpose of preventing threats that the locals might pose.

Despite the general acceptance of Arnstein's typology (1969) and the like to describe different forms of CP, Choguill (1996) argued that it is too Western-biased and cannot be fully applied to underdeveloped countries. In this context, due to lack of democratic tradition, shortage of resources, and generally far more constraints than developed countries (e.g., low literacy rates), non-intervention on behalf of the government can be seen as abandoning local communities to their destiny rather than granting them citizen power. As a result, Choguill (1996) offered an alternative ladder of CP, which acknowledges the vital role of governmental support, assistance, and collaboration in community-based planning and development. In her typology, the lowest level of CP is termed "self-management," in which communities are neglected by authorities and attempt to plan improvements by themselves without governmental interest or aid. In many cases, this causes projects to fail. The highest hierarchical degree of CP was termed "empowerment," in which communities demonstrate substantial control over decision-making processes and are expected to initiate plans, while they are assisted and supported by governmental or non-governmental organizations.

This recognized key role of external support and the willingness of government to back the process are highly relevant in the tourism context, where CP is often viewed as an important sustainable principle for tourism development in underdeveloped regions (Briedenhann and Wickens 2004; Brohman 1996). For example, in his analysis of sustainable tourism development of Taquile Island, Peru, Mitchell (2008) attributed resident support for local tourism to both their high involvement in local decision making concerning tourism and the financial and administrative support provided by the local government. He stressed that "favorable municipal and national government support and policies may ensure that a greater proportion of residents ultimately gain from local tourism activities" (p. 177). This and other case studies in tourism planning and development emphasize that empowering local communities implies not only granting them autonomy over tourism planning and development but also providing them the suitable tools and conditions to succeed and improve their QOL. Correspondingly, when referring to tourism development in China, Wang et al. (2010) argued that

...local government must take on the role of acting as the facilitator of bottom-up approaches to decision making. The implementation of community participation needs the participation of local government, including guidance in ideas generation, the identification of objectives and approaches in the development of tourism, and the establishment of the monitoring of environmental data... (p. 5).

Notwithstanding the usefulness of the above typologies of CP, they do share some weaknesses and limitations. It should be noted that diffusion between stages of power distribution can occur even in a single CP program, depending on changing circumstances. Additionally, the common denominator among these typologies is that CP is desirable and contributes to community well-being. Nevertheless, arguments have also been raised against applying CP, at least under certain conditions. For example, it has been claimed that CP might encourage separation and "balkanization," as local groups might pay attention solely to their own interests (Gittell 1972).

Tosun (2006) also mentioned that these typologies also ignore other relevant factors, such as the number of citizens that should participate and significant barriers for the implementation of CP. Consequently, special consideration should be directed toward the impediments that might prevent CP programs from fulfilling their potential to the fullest while improving the QOL of local residents.

Obstacles and Challenges for Community Participation

Despite the well-cited advantages of CP programs, as expressed in the aforementioned community- and planning-oriented CP objectives, it has been acknowledged that not all of these benefits are expected to always occur. A variety of factors that can limit the effectiveness or efficiency of CP was noted. Botes and van Rensburg (2000) divided impediments to CP into external obstacles, which originated from outside of the beneficiary community, and internal obstacles, which refer to obstructions generated from within the community itself. External obstacles include:

1. Paternalistic attitudes of development professionals, who often refuse to recognize the limits of their expertise and experience and express attitudes of contempt and lack of trust regarding locals' ability to contribute to the decision-making process.
2. Development professionals may feel uncomfortable in integrating local citizens in planning as it involves sharing their knowledge and skills.
3. Governmental and municipal bureaucracies tend to respond slowly and ineffectively to participatory initiatives. In some cases, CP is used to perpetuate existing power relations rather than challenging them.
4. There is a tendency on the part of development bodies to select the most "convenient" participants for the process, namely those who are more likely to fall into line with the administrative approach, or simply participants who are more visible, vocal, educated, and wealthy, rather than participants who truly reflect the socioeconomic and cultural fabric of the affected community.
5. In many development projects, emphasis is placed on "hard issues," such as technological and economical matters, rather than "soft issues," such as cultural and social concerns. Focusing on technical aspects might alienate community members and neglect social processes which are essential for the project success.
6. Development professionals tend to exaggerate when reporting successes, a tendency which often prevents improvements in the process that can include the involvement of community members.

Some of these impediments were observed by Yang and Wall (2008) in their analysis of the current status of tourism development in Xishuangbanna, Yunnan, China. They found poor community participation in tourism planning, resulting mainly from lack of appreciation of the process shown by government officials and private planners. Tourism planners often view local residents as too ignorant to contribute to the planning process. This was also manifested in local planning authorities considering the involvement of strong groups such as major tourism developers and entrepreneurs, and academic tourism researchers as adequate citizen involvement. In contrast, less powerful, affluent and/or educated locals have virtually no opportunities to review planning documents or state their concerns to governmental bodies.

Another significant barrier to community participation is that many development professionals do not recognize the need to provide the participants with the skills, knowledge, and resources required to significantly contribute to the process (Gray 1985). Developers are also often reluctant to initiate CP since they consider the process to be quite costly and lengthy, when compared

to decision making by the professionals alone (Watt et al. 2000). It should be noted, however, that these costs are often balanced when considering that CP can save time and money in the long term, since it generates citizens with goodwill who are committed to the development project and are actively engaged in its implementation (Bamberger 1986).

On the other hand, many barriers to CP programs can derive from the communities involved. Some of the internal obstacles that are often revealed are (Sawyer 1995):

1. Conflicts that arise between different interest groups in the community can distort the CP process. Thus, it is vital to recognize the heterogeneity that exists within communities, which is often reflected in different visions regarding the nature and characteristics of the development.
2. Elite groups might prevent weaker and vulnerable groups of society (e.g., minorities and women) from taking an active part in CP. Strong interest groups can see CP programs as tools to control local resources and advance their own self-interest.
3. The assumption that local citizens always want to participate is not always proven to be correct. This can result from either general lack of interest or awareness of the significance of CP, reliance on elected representatives to seek the community's best interests, or skepticism regarding the effectiveness of CP and its ability to generate actual benefits to the community. Many are disappointed from past CP attempts that failed to realize its promises.

Exemplifications to these impediments were revealed in Blackstock's study (2005) of the Australian tourism destination of Port Douglas in North Queensland. She illustrated how in some cases "community" actions reflect the interests of the wealthy residents, rather than those of the less affluent. For example, a campaign was launched in 1997 under the heading "Keep Port Douglas Unique," protesting plans to develop venues such as a fast food outlet and large supermarket. Although the declared goal of the campaign was to preserve the distinctiveness of the destination from mainland Australia, in fact it was led by local tourism operators who wished to defend their business interests. Indeed, lower-economic class residents were actually likely to benefit from the supermarket and the fast food outlet, in terms of lower grocery bills and more affordable leisure venues. The analysis also explored residents' feelings of cynicism regarding community participation, rooted in a disbelief in their ability to influence policies and plans.

This last barrier has been one of the impetuses to the widespread recognition that CP is not always desirable and/or applicable. Some groups express apathy and low involvement in their communities and are likely to show no interest of involvement in CP. Note that especially in underdeveloped destinations, many of the citizens are occupied in attempts to survive, which consumes most of their time and energy (Tosun 2000). In some cases, the involvement of locals can be prohibited by law or technically impossible. Burke (1968), for example, mentioned issues of national security and projects that require rigorous technical competency, in which CP might not be appropriate and other means to secure citizen well-being should be employed. Additionally, the divisions among communities led to the recommendation that CP programs should be reconsidered in cases of highly fragmented and heterogeneous communities, or in large geographical regions (Irvin and Stansbury 2004). Indeed, Mitchell (2008), in the aforementioned case study analysis of Taquile Island, noted that the small size and homogenous nature of the community were important factors in enabling efficient and effective collective decision making, in addition to the strong sense of solidarity and group identity within the community.

A challenge to the common perception that only when local residents are involved in the decision-making process can they gain benefits and their interests be respected was brought by Li (2006) in a case study analysis focusing on Jiuzhaigou Biosphere Reserve (JBR) in Sichuan Province, China. The results of her study indicated that the local residents were well participated in the benefits generated from tourism development in the area, including increasing income and employment. However, no CP in decision making took place in any way, as all the developmental and managerial decisions were suggested and made by the reserve administration. Li (2006)

concluded that in contrast to the present academic consensus that CP is essential for the locals to benefit from tourism development, “JBR ecotourism was successful despite apparently weak local participation in the decision-making process” (p. 140).

The following possibilities were raised as explanations of these findings and might be conditions in which CP is less crucial: (1) managerial understanding of the crucial need to ensure the well-being of locals in tourism development; (2) educated managers who originated from the local villages and were aware of sustainable principles of development; (3) possessing no personal property in the area limits the incentives for the locals to be involved in tourism development issues; and (4) it is possible that, at least in the early stages of development, efficiency was more valued than fairness. Thus, the necessity of CP is place and situation dependant, while the process should be regarded as means to improve people’s QOL rather than an end in itself. Nevertheless, surveys conducted at other tourism destinations such as Langkawi, Malaysia (Marzuki 2008), Ürgüp, Turkey (Tosun 2006), and Yogyakarta, Indonesia (Timothy 1999), indicated that for the most part, locals do desire some form of involvement in tourism planning.

Community Participation Techniques

Launching a successful CP program does not end in a public relations declaration regarding the importance of the people’s views but requires the establishment of adequate mechanisms to ensure the ability of local residents to have a say in tourism planning and development. Broadly speaking, CP techniques can be categorized into unstructured, structured, active process, and passive process techniques, based on the level of control developers have on the CP process (Glass 1979). In unstructured techniques, developers have little impact on the identity and quantity of the participants, as well as the type of information generated, while in structured techniques, developers have greater control of the CP process when there are stricter structures to participatory activities. Active process techniques exemplify a higher level of control in the process, when local residents are actively involved in the decision making. Lastly, passive process techniques are the most structured and controlled CP tools, when the residents do not have decision-making authority.

Not surprisingly, the chosen CP techniques depend to a great extent on the CP objectives sought in the first place. Marien and Pizam (1997) divided CP techniques to those based on community-oriented objectives (or citizens’ objectives) and those based on planning-oriented objectives (or administrative objectives). The latter are typically corresponded with unstructured techniques, which include information exchange mechanisms such as drop-in centers, public hearings, focus group sessions, and telecommunication techniques, and structured techniques, which include education and support-building methods such as advisory groups, workshops, and expert paneling. In contrast, the former are typically corresponded with active process techniques, which include decision-making supplements such as litigation and role playing, active representational input techniques such as votes and partnership, and passive representational input techniques such as Delphi process and citizen survey. A description of both developing and community-oriented CP techniques appears in Table 32.4.

At present, in most western democratic countries, all development projects have to be permitted by a branch of the government which in many cases is composed of elected officials. At the local level, these officials are advised by Citizen Advisory Boards whose task is to review the proposed developments and make recommendations to the elected officials who have the authority to approve or reject the proposed developments. These boards are comprised of citizen members who voluntarily and without compensation devote their time and talents to a variety of zoning and land development issues in the community and are normally appointed by

Table 32.4 Community participation techniques

Developing-oriented objectives	Community-oriented objectives
Information exchange <ol style="list-style-type: none"> 1. <i>Drop-in centers</i> – physical and electronic locations where residents can receive or give information on a proposed tourism plan 2. <i>Public hearings</i> – proceedings in which residents are invited to express their views before decision makers 3. <i>Group public meetings</i> – less formal gatherings usually held in neighborhoods and often used for one-way communication only 4. <i>Focus group interviews</i> – selected representatives from different groups are interviewed in a round-table dialogue 5. <i>Telecommunications techniques</i> – means such as television, radio, Internet, e-mails, etc., that allow authorities to send and receive information Education and support building <ol style="list-style-type: none"> 1. <i>Advisory groups and task forces</i> – these groups are selected to advise developers on a specific issue, but they do not necessarily represent the entire community and do not have actual decision-making authority 2. <i>Technical and professional advice</i> – specific professionals (e.g., architects, engineers) are hired to consult on the project, yet they are accountable to the authorities that hired them 3. <i>Petitions</i> – attempts on behalf of citizens to educate the decision makers regarding their views, opinions, and preferences 4. <i>Workshops and seminars</i> – meetings where citizens and developers intensively discuss the development project while raising relevant issues and suggesting alternatives 5. <i>Expert paneling</i> – meetings where the general public is invited to attend, where experts discuss technical issues regarding development projects among themselves. These meetings are often too technical and not well understood by non-professional residents 6. <i>Formal and professional training</i> – citizens might be sent to specific courses where they learn about designing and developing participatory programs 	Decision-making supplements <ol style="list-style-type: none"> 1. <i>Direct confrontation</i> – attempts to influence decision making by residents by verbally challenging power holders, for example through demonstrations 2. <i>Litigation</i> – legal actions taken by citizens to change or abolish governmental plans or decisions 3. <i>Role playing and game playing</i> – various stakeholders from different interest groups in the community are asked to “swap roles,” and to represent their opponents’ perspective. This technique aims to generate greater understanding and consensus within the community Representational input (active) <ol style="list-style-type: none"> 1. <i>Votes, referendums, and plebiscites</i> – in these initiatives, plans are voted on by the general public. In some cases, citizens themselves can issue a referendum by getting certain percentage of signatures 2. <i>Partnership</i> – a certain number of seats on public councils are reserved for local representatives. This technique is often used on local tourism councils. The vital issue is whether the representatives indeed represent the community at large 3. <i>Delegated power</i> – assigning citizen groups with authority over certain issues or components of a plan 4. <i>Citizen control</i> – local residents are granted full responsibility over a plan or a function Representational input (passive) <ol style="list-style-type: none"> 1. <i>Nominal group technique (NGT)</i> – a systematic approach through group sessions led by a moderator. The end result is an inventory of ideas related to the subject matter, and the desirability of each idea by the participants 2. <i>Delphi process</i> – procedure in which the participants are asked to propose issues or ideas, and a moderator passes them on to the rest of the group members to rank their preferences 3. <i>Citizen surveys</i> – usually conducted through the use of probability sampling and analyzed by statistical procedures

Source: Adopted from Marien and Pizam (1997)

a government official (i.e., a Mayor) or an elected body (i.e., City Council). These boards (i.e., Municipal Planning Board) hold public hearings to review and report recommendations to the elected officials (i.e., City Council) on issues such as plats for the subdivision of land, rezoning, master plans, planned developments, developments of regional impact, etc. However, it should be emphasized that all recommendations and decisions of these board are subject to the review and approval of the elected officials, and therefore many critics do not see this process of CP as a true participatory one.

Certain CP programs may combine several techniques to achieve their goals. Rowat and Engelhardt (2007) depicted attempts to develop ecotourism in the Seychelles around the attraction of whale shark watching, in which the community stakeholders were invited to contribute to its planning and management. In the first stage, a workshop was scheduled and announced a few weeks prior to the event to the interested parties and the general public through e-mails and newspaper advertisements. The main purpose of the workshop was to develop a national whale shark monitoring network and to examine the feasibility of turning whale shark watching into an ecotourism resource. The participants were informed about the status of the species, and the idea of founding such a network was positively accepted. Overall, the workshop participants indicated the whale shark habitual occurrence makes them a viable ecotourism attraction but raised several concerns such as forecasting their location and disrupting the natural behavior of the animals. In addition, the participants suggested conducting a larger-scale survey that will reach out further to stakeholders and allow additional perspectives. Consequently, a questionnaire was developed and distributed to a wide variety of stakeholders. The survey's results demonstrated a high awareness of whale sharks and the best season to view them. General agreement emerged that ecotourism can be developed when whale sharks are the primary attraction.

Lastly, a second national public workshop was conducted, which focused on tourism encounter policy with whale sharks. The participants were informed of the survey results, briefed on a possible policy model, and asked to adapt it to the case of the Seychelles. Following the implementation of the program, it was found that it was well received, resulting in significant economic benefits to the local communities. The case demonstrates the potential of combining a variety of techniques in a single development project, which contribute to support building and information exchange, while also allowing citizens to provide input through a survey. Also, Rowat and Engelhardt (2007) discovered that the CP in the early stages of the projects as well as the consistent feedback received from stakeholders were key elements in the success of the whale shark ecotourism development.

Community Participation: Lessons Learned

Although every development project, community, and region is unique with different circumstances, the extensive research on CP in various disciplines, including tourism, has revealed useful general guidelines for conducting efficient and effective CP programs, once such an initiative takes place (e.g., Blackstock 2005; Botes and van Rensburg 2000; Brohman 1996; Glass 1979; Irvin and Stansbury 2004; Marien and Pizam 1997; Marzuki 2008; Tosun 2000, 2006; Keogh 1990). One of the main CP principles is to avoid selective participatory practices and ensure the involvement of a variety of stakeholders, including minorities and deprived groups, rather than merely elite groups, strong interest groups, and community leaders. The need to learn from past mistakes was also acknowledged, when both failures and successes should be acknowledged and the necessary implications be derived from them. It was also suggested that effective CP should involve the various stakeholders to collaborate in defining the needs and objectives of the development, and planning the adequate processes to reach them. In addition, it was proposed that citizens should be involved in early stages of planning to increase the success rate of the program. Regarding the implementation of the CP process, it should be noted that realizing CP objectives is directly associated with choosing the right CP techniques for that purpose. Whatever the chosen technique, information on tourism planning and development issues should not only be accessible to the public – utilizing variety of information sources to ensure appropriate coverage – but also be presented comprehensibly and clearly, avoiding the use of overly technical jargon. Transparency and openness are core principles when informing the public of future tourism

projects, acknowledging not only their potential positive impacts but also negative aspects that might jeopardize some facets of residents' QOL.

Since CP is particularly sought in less-developed tourism destinations that have an abundance of difficulties, it should be stressed that successful CP requires the removal of geographical, economical, cultural, and social barriers that prevent local community members from being involved in the decision-making process. Possible solutions include enhancing education in communities with respect to democratic values, establishing convenient transportation to the CP sessions, and providing adequate compensation for their time and efforts, ensuring the heterogeneity of the participants, encouraging less-prominent groups to express themselves, and more. In this regard, non-governmental organizations have an important role, particularly in Third World destinations, to empower local communities and facilitate their involvement in planning and development. The development authorities, on the other hand, should express commitment to CP while recognizing the need for a consistent and lengthy process and significant financial investment. They should also ensure that the professionals involved are well trained to work with the public, and that the participants hold realistic expectations regarding CP to avoid unnecessary disappointments and resentments.

There is general agreement that participation in development processes is important, yet is secondary to the empowerment of local communities to share the benefits of development. In fact, this chapter's review reveals that under certain circumstances, local communities can benefit without actually participating in decision making. It is advisable to allocate funding to improving program implementation, rather than to participatory initiatives, for example, in cases when the population is unenthusiastic about taking an active role in planning and believes it to be the role of development professionals, or when the technological information involved is too complex. Other circumstances in which CP might not be the most suitable sort of action are cases of overly heterogeneous communities and/or communities with a low sense of solidarity and cohesion.

Conclusion and Future Research

This chapter aimed to assist both academic researchers and practitioners in understanding the key issues in the use of CP for tourism planning and development. Despite the declared aspirations to enhance people's QOL through their involvement in decision making (i.e., community-oriented objectives), it should be emphasized that in many cases CP is viewed as a tool to gain locals' support toward the successful completion of the development project (i.e., planning-oriented objectives). Furthermore, cases are noted where CP was cynically used to manipulate community members and perpetuate the power relations in society, rather than create a more just redistribution of benefits. The possibility that local residents can be involved in the benefits of tourism development without actively participating in its planning was also demonstrated. This leads to the conclusion that the merits of CP should be measured both through process evaluation (i.e., how well the CP initiative was carried out) and through the program outcome (i.e., its impacts on the QOL of the community and the success of the tourism project) (see Butterfoss 2006).

Indicators that can be used to measure the effectiveness of CP in terms of its QOL impacts include (1) economic empowerment (e.g., economic gains and consequently improvements in life conditions); (2) psychological empowerment (enhancement of people's self-esteem and confidence, improvement in the status of weak sectors); (3) social empowerment (e.g., enhancement of community and family unity and solidarity, investment in community resources such as schools); and (4) political empowerment (e.g., establishing political structure which allows the general population to express its views and actively influence processes) (Scheyvens 1999). Yet

one of the main challenges facing scholars and practitioners is to develop suitable and accurate measures for the above, as it consists primarily of abstract notions that are difficult to quantify. Despite previous attempts to formulate general indicators for sustainable community tourism (Choi and Sirakaya 2006; Reid et al. 2004) and tools to measure residents' attitudes toward sustainable tourism (Choi and Sirakaya 2005), there is still a need to develop measures that specifically examine the capacity of CP programs to enhance residents' QOL in tourism destinations and their satisfaction from the outcomes of the process. Such attempts are critical for assessing whether community participation is a viable means of enhancing the QOL of residents or a mere tool for legitimizing tourism projects, while compromising the vital interests of the community.

Additionally, the abundance of obstacles and constraints for CP calls for developing methodologies for the evaluation of the participation process. This chapter's review reveals only partial and fragmented attempts to develop and measure indicators of CP in the tourism context (e.g., the intensity of the participation, the identity of the participants, residents' views on the process, residents' influence in decision making, etc.). Nevertheless, the great attention CP in tourism planning attracts, as well the high costs involved in its implementation, requires the formulation of more inclusive measures to evaluate its effectiveness and efficiency. An integrative approach that considers different aspects of the CP process will provide a more comprehensive picture as to the process evaluation. Moreover, it should be noted that the complexity and long-term effects of the process necessitate additional longitudinal studies to examine its consistency over time and its long-term effects. Finally, the multi-faceted nature of the phenomenon entails the consideration of the perspectives of all stakeholders, including residents, community leaders, local business owners, governmental officials, private planners, NGO members, tourists, and more.

The literature review reveals a wide variety of techniques to implement CP programs for various purposes (Glass 1979; Marien and Pizam 1997). The combination of several techniques was also shown to be useful in generating effective results from CP. Yet the growing trend of Internet marketing and electronic commerce points to new opportunities of CP, including the use of online networks and communities to encourage and receive residents' views and feedback on tourism planning and development. The feasibility and effectiveness of online participation programs should be explored, as it has some potential advantages over traditional CP techniques. For example, online CP programs can keep the residents better informed of plans and policies, updating them in real time on recent developments and changes. Through the use of information systems, planning authorities can also offer online surveys and a "suggestion box" for concerned citizens to express their views and attitudes toward tourism projects. Furthermore, it can provide more accessible information to residents in the comfort of their own homes, saving them needless transportation costs and bother. Online techniques might also improve the participation rate of people with less political awareness who are usually reluctant to be involved in political processes.

No less important, online procedures can provide planners with more current information regarding the public's perceptions on the issues, allow them to be more attentive to changes in attitudes throughout the implementation of projects, and cut costs of organizing meeting places and publishing written information materials. Nevertheless, it should be acknowledged that minority groups have less access to computers and the Internet, which might put them in an inferior position in contributing to online CP programs. Consequently, such initiatives should be combined with more traditional methods to ensure ease of access to the entire population. Future studies should explore the prospects of online participation, including its advantages and challenges, while evaluating its contribution to tourism planning and development.

To conclude, the heavy reliance of the tourism destinations on the local community, both as an attraction in itself and as a facilitator for tourism growth, and in contrast, the significant impacts tourism development has on local residents' QOL require that involvement of local residents in the planning process should be positively considered. No less important, the attempts of many tourism destinations to adopt standards and practices of sustainable development and

market themselves accordingly require that communities' perspective be considered and that they have the opportunity to influence the nature of tourism development within their area.

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Chapter 33

The Role of Tourism in Sustainable Communities

Timothy J. Tyrrell and Robert J. Johnston

Introduction

Plan for what is difficult while it is easy, do what is great while it is small. The difficult things in this world must be done while they are easy, the greatest things in the world must be done while they are still small.
Sun-tzu, *The Art of War*, trans. Samuel B. Griffith (Oxford, 1963)

Sustainable tourism – notwithstanding the various ways that one may define the concept (Johnston and Tyrrell 2005) – requires attention not only to joint sustainability of environmental resources and industry profitability but also attention to social, cultural, and economic outcomes. These outcomes are related to a broader characterization of sustainability, social prosperity, community development, and quality-of-life (QOL) (Crouch and Ritchie 1999; Schianetz et al. 2007; Tyrrell et al. 2010; Tyrrell and Johnston 2008). The Charter for Sustainable Tourism, developed at the first World Conference on Sustainable Tourism hosted by the World Tourism Organization in April 1995, identifies 18 goals for sustainable tourism. Explicit in these goals is a multiobjective approach to sustainability that recognizes the importance of coordinated environmental, socio-cultural, and economic development outcomes.

Until recently, research addressing these and other aspects of tourism sustainability has been largely divorced from formal, quantitative models of sustainable development (Tyrrell and Johnston 2005; Casagrandi and Rinaldi 2002). Moreover, with few exceptions, treatment of environmental and/or economic sustainability is considered apart from broader concepts of social or cultural outcomes (Tyrrell and Johnston 2008; Crouch and Ritchie 1999). Increasingly, however, the relationships between environmental, social, and economic aspects of tourism sustainability and regional development are becoming evident (Tyrrell et al. 2010). There is also increasing recognition of the need for more formal, quantitative models that coordinate environmental, social, and economic aspects of tourism within the broader framework of local QOL and tourism competitiveness (Crouch and Ritchie 1999; Tyrrell et al. 2010).

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This chapter illustrates a model through which more comprehensive analyses of tourism sustainability can be implemented within the context of broader regional or community development goals. The model focuses on the relationship between the visitor industry and community QOL as influenced by impacts on economic, sociocultural, and environmental outcomes. This perspective is similar to the triple bottom line (TBL) performance of businesses that add socio-cultural and environmental dimensions to the traditional economic bottom line (Elkington 1994). The TBL concept stresses the importance and interdependence of economic, environmental, and social performance, but it is generally interpreted and applied as a metaphor rather than a formal economic or accounting framework (Suggett and Goodsir 2002).

In contrast, the proposed approach interprets the TBL concept as an economic framework in which each of the three bottom lines is directly related to a type of community outcome that may be measured using quantitative indicators. Compared to a narrower perspective on economic returns and environmental impacts, a TBL approach promotes a broader approach to tourism sustainability that can promote improved returns to both businesses and the communities in which they reside (Dwyer 2005; Faux 2005). TBL reporting is “based on the premise that by monitoring and reporting social, economic and environmental performance, organizations can better prepare for future challenges and opportunities, including those traditionally considered intangible, such as reputation” (Australian Government. Department of the Environment, Water, Heritage, and the Arts, 2003: p. 6). By combining a TBL approach to tourism outcomes (e.g., Darcy et al. 2010; Dwyer et al. 2005; Faux 2005) with a dynamic model of tourism sustainability (Casagrandi and Rinaldi 2002; Johnston and Tyrrell 2005, 2008), the presented model is designed to provide insight into trade-offs implied in planning for sustainable tourism.

We begin with a dynamic model of tourism sustainability that extends the approach of (Johnston and Tyrrell (2005); Tyrrell and Johnston 2008); this model frames the analysis of long-term sustainability in tourism planning, with a focus on a steady-state solution for local tourism and QOL. Within this stylized model, the components of QOL are not yet defined formally, although they are understood to include economic, sociocultural, and environmental attributes, following standard TBL approaches (Faux 2005; Dwyer et al. 2005). We then develop a specific mathematical form of the QOL objective function for a 30-year planning horizon, showing how this function can allow different tourism-related possibilities for reaching similar QOL objectives for the current generation, and how it can frame specific trade-offs in tourism planning. Finally, we discuss implications of the combined model for the temporal dynamics of tourism and community development, as well as additional steps that are necessary in order to use such tools for specific planning applications.

The narrow goal of this chapter is to take the first steps toward the development of a specific mathematical formula for practical community planning from a theoretical and stylized model that combines dynamic optimization with a TBL approach to tourism. The broader goals are to characterize a more quantitative and holistic approach toward tourism sustainability and community development and to stimulate future research regarding the potential role of such approaches in guiding tourism policy. We emphasize that the purpose of the presentation is to characterize a *general class* of coordinated models that could be used – in combination with a comprehensive empirical research agenda for a specific tourism destination – to provide more systematic, quantitative insight into the trade-offs involved in the search for sustainable outcomes that maximize QOL, as influenced by a TBL of environmental, sociocultural and economic outcomes. The presented dynamic models are intentionally stylized and general to promote future adaptation to specific policy contexts. Moreover, it is not suggested that the exact functional forms and assumptions will be directly applicable to any particular tourism destination, rather only that the general approach might be adapted for use based on site-specific empirical research.

The Dynamics of Tourism Sustainability and Community Benefits

This section adapts the basic model of Johnston and Tyrrell (2005) as a foundation for subsequent analysis of tourism dynamics and community QOL. We frame the analysis as a discussion of community tourism, although one could use identical models for a destination of any geographical definition or size. The model draws from a general framework which treats the community as a composition of systems and subsystems that contribute to the well-being of residents. The model shown in Fig. 33.1 is an abstracted version of this community system that focuses on the value of the visitor industry and the influence of externally generated growth in tourist visitors on community QOL through impacts on direct economic benefits, sociocultural community assets, and environmental community assets.

Within this framework, we take a utilitarian perspective toward QOL, drawing from a neo-classical economic perspective. That is, we assume that one can model QOL as an objective function of observable, often substitutable factors which influence residents' welfare. We assume that the economic (market) benefits of tourism can be measured using standard tools for benefit cost analysis available to economists (Boardman et al. 2006). Sociocultural and environmental community assets are assumed to be measured by indexes¹; residents are assumed to derive benefits directly from these assets which generate quality-of-life. Asset indexes (a combination of size and quality) increase or decrease over time because of net endogenous growth. It is also assumed that each is influenced by the number of external visitors. Drawing from this conceptual framework, the formal dynamic model contains two basic equations: The first characterizes the long-term community development objective, and the second describes unavoidable dynamic trade-offs in the system. The fundamental trade-offs in the model relate to the influence of the quantity of tourism on the dynamic interplay among community TBL outcomes and QOL. Feedback of QOL on the quantity and quality of tourism is not captured.

To simplify the model, we assume that the quantity of community tourism can be meaningfully characterized by a single indicator, V (e.g., visitor numbers),² which contributes directly to

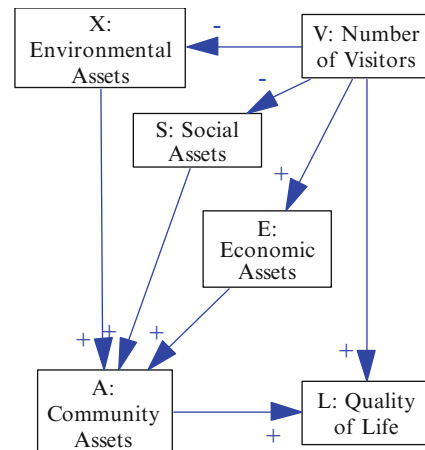


Fig. 33.1 A stylized model of a community with visitor impacts

¹To create these indexes, one might combine different indicators of QOL related to environmental, economic, and sociocultural influences. The use of indicators to characterize various elements of QOL and/or satisfaction is common in the literature (e.g., Perdue et al. 1999; Neal et al. 2004).

²More complex model variants might define tourism quantity using more complex multimetric indicators; we abstract from such possibilities to maintain an emphasis on other aspects of model development.

the current community benefits of tourism and indirectly to the combined stock of community environmental (X), sociocultural (S), and economic (E) assets represented by a composite variable A . We assume that the direct benefits of tourism also depend on these community assets. That is, tourists are often willing to pay more to visit destinations with high environmental quality or cultural authenticity, *ceteris paribus*, so that the market benefits from tourism depend not only on the quantity of tourism but on environmental and sociocultural characteristics of the community.

Given these assumptions, the first equation in the model characterizes community benefits (or QOL, quantified by the variable L) as determined by the contributions of the direct market benefits of tourism and community assets A to community well-being: $L = L(V, A)$. This shows how QOL is related to a TBL of economic, environmental, and sociocultural outcomes of tourism. For now, we leave the specific mathematical structure of $L(V, A)$ undefined. Specific functional forms, definitions, and components for this function will be explored in the following sections. All model variables may vary over time t (e.g., $V = V(t)$); this dependency on t is also suppressed to simplify notation.

We assume that QOL is increasing in A , but at a decreasing rate, as you might find in the second half of an S-curve. That is, L increases as environmental, sociocultural, and economic assets increase, holding all else constant, but each additional unit of A adds a little less to QOL, on the margin. This reflects diminishing marginal returns to A in terms of community QOL. In contrast, holding A constant, the effect of V on L could be positive, zero, or negative. In general, we might expect the marginal effect of V on L to be positive but diminishing for small tourism quantities (V), ultimately turning negative for larger V .

This relationship may be formalized in a dynamic framework using the following equation, in which the community chooses the quantity of tourism (V) in each time period to maximize the sum of discounted QOL over time, given by:

$$\int_0^{\infty} [L(V, A)] e^{-rt} dt, \quad (33.1)$$

where the term e^{-rt} reflects the fact that present increases in QOL are more highly valued than future increases, r is the rate of time preference (or discount rate), t is the time period, and e is the exponential operator. Additional details of equations of this general type, which follow standard approaches in the economics literature, are provided by Johnston and Tyrrell (2005).

The second structural equation characterizes the dynamic relationship between tourist activity V and community assets A . Tourists both are attracted by and degrade community environmental and sociocultural assets, which in turn are renewed based on natural, social, and economic processes. That is, the influences of the assets on each other are meant to reflect the self-organizing and mutually reinforcing interactions within the community system (Krugman 1996). These self-organizing properties generate a natural growth or renewal in these assets – A naturally renews itself over time. The levels of community assets over time are also influenced by the quantity of tourism (V).

The equation describing the total per-period change in community assets combines the likely negative influence of tourism V , given by $g(V)$, with the positive influence of a natural growth/renewal function $h(A)$:

$$\dot{A} = h(A) + g(V) \quad (33.2)$$

where the dot ($\dot{\cdot}$) represents a change with respect to time. That is, in Eq. 33.2, \dot{A} indicates the *change* in the combined index of community environmental, sociocultural, and economic assets quality from period to period, which may be positive, negative, or zero. Sustainability of

environmental quality occurs where $\dot{A}=0$, i.e., there is no change in community assets over time. In a very simple version of model, we can define (33.2) such that $g(V)=-\delta V$ so that V has a linear impact on the change in community assets.³ Accordingly,

$$\dot{A} = h(A) - \delta V \quad (33.3)$$

This implies that V has a fixed and negative marginal influence of δ on community environmental, sociocultural, and economic assets A .⁴ While such assumptions are not necessary, they permit model implications to be explored with a minimum of complexity and notation. This model also assumes – as noted above – that environmental (X), sociocultural (S), and economic assets (E) may be mathematically combined as a single asset index A with growth $h(A)$. Implications of relaxing this assumption are discussed in the following sections of this chapter.

The question for sustainable tourism planning is how to choose tourism trajectories that maintain a sustainable balance of community assets and also maximize long-term community QOL. The calculus of variations provides a solution for this problem (Chiang 1992). Formally, we maximize (33.1) subject to (33.3). To minimize mathematical notation – and to maintain clarity for those unfamiliar with such methods – we suppress the full set of conditions for a maximum. Instead, we move directly to the equations characterizing implications for the optimal tourism and community assets over time. Given our simple model specification, the equation characterizing the *change in tourism over time consistent with the maximization of community QOL* is given by

$$\dot{V} = \frac{(L_V)(r - h_A) - L_A}{\delta L_{VV}} \quad (33.4)$$

Following standard mathematical notation, subscripts denote partial derivatives, reflecting the marginal change in a variable caused by a one unit change in another variable evaluated at a specific point. For example, L_A represents the partial derivative of QOL with respect to changes in community assets A , and L_{VV} represents the second derivative of this variable with respect to tourism quantity V .⁵

Equation 33.4 shows the change in tourism consistent with maximization of the present value of community QOL. This equation reflects mathematically how this simple measure of tourism (V) would be changed to maximize the discounted sum of QOL, given any specific starting point. In more formal terms, Eq. 33.4 characterizes changes along an optimal path with regard to tourism in each time period from the perspective of the community. Equations such as (33.1) and (33.4), governing movement of the system, can be difficult to interpret in the abstract. If we assume a particular form for the equation governing renewal of community assets over time, however, one can characterize optimal solutions using a more intuitive phase diagram of the type shown in Fig. 33.2. This diagram assumes a simple logistic growth function $h(A)$ in addition to the linear effect of V noted above. It also assumes a general form for $L(V, A)$ such that $L_V > 0$, $L_A > 0$, $L_{VV} < 0$, and $L_{AA} < 0$, as noted earlier.

Although Fig. 33.2 may seem unfamiliar to some, such diagrams are a common means to characterize solutions to dynamic problems. One may think of this diagram as a map. Each point

³Johnston and Tyrrell (2005) detail some of the assumptions implicit in this simplification.

⁴More complicated specifications could allow V to have different effects on different community assets. For example, in some instances, V might be assumed to have a positive marginal effect on economic assets E but a negative marginal effect on environmental and sociocultural assets (X and S). These changes, however, further complicate model solutions and interpretations.

⁵In general, we assume that $L_V > 0$, $L_A > 0$, $L_{VV} < 0$, $L_{AA} < 0$.

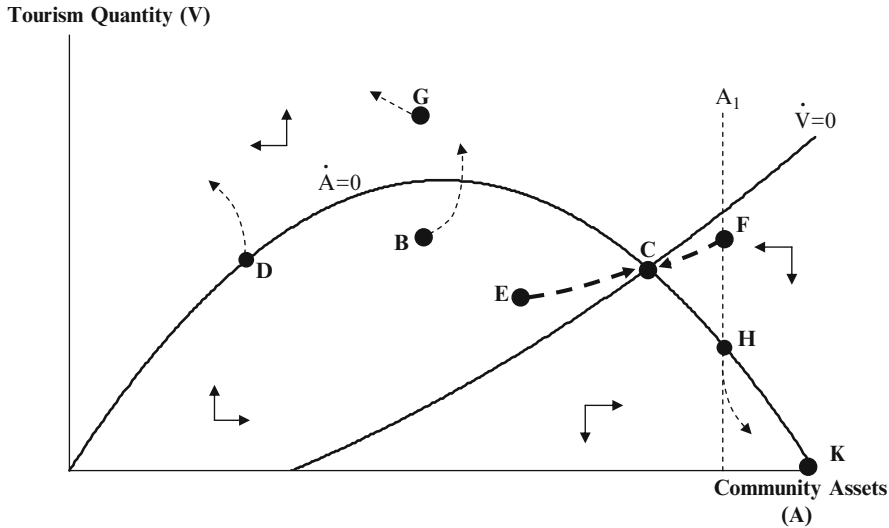


Fig. 33.2 Phase diagram for tourism to maximize community quality-of-life: steady-state and optimal paths

on the map lies on some optimal route that might be taken between places. Given Eqs. 33.2 and 33.4 and an initial level of community assets (A), each optimal path is determined by a selected starting point for tourism (V) – once the initial point is chosen, the remainder of the path is determined by model equations. Ideally, one would specify the entire path as part of a tourism plan, with the goal of ultimately reaching a particular sustainable (steady-state) end point. One may also choose a starting point for V on a path that does *not* lead to a sustainable point. The model will provide guidance about such paths as well. Such alternate paths may produce long-run discounted net benefits nearly equal to those of the path to the steady state, and perhaps greater in the short or medium run. However, these points will not lead to steady-state sustainable outcomes for community tourism and QOL (i.e., paths that maintain community assets and optimal tourism benefits indefinitely).

Within the phase diagram, sustainability of community environmental and sociocultural assets occurs where $\dot{A} = 0$ (i.e., no change over time). This occurs where natural renewal of community assets⁶ exactly offsets tourism-related degradation, or where $h(A) - \delta V = 0$. Based on this mathematical relationship, the $\dot{A} = 0$ curve in Fig. 33.2 illustrates all sustainable levels of community assets A and tourism V . Each point along the $\dot{A} = 0$ curve identifies a sustainable pair of tourism and community asset levels. Points above the curve (e.g., point G) represent conditions in which asset loss due to tourism exceeds natural renewal – hence, environmental, sociocultural, and economic assets will degrade over time. Points below the curve (e.g., point B) represent conditions in which natural renewal exceeds tourism-induced damage – hence, assets will grow over time. Continuous positive changes in community assets, while perhaps desirable, cannot be sustained indefinitely since they will ultimately lead to a “carrying capacity” K where no further improvement in A is possible. Only along the illustrated curve does natural renewal exactly balance visitor damage over time – a sustainable condition.

The QOL locus $\dot{V} = 0$ represents points that maximize QOL among residents, given the constraint that the quantity of tourism does not change over time, based on (33.4). To the left of this

⁶This includes renewable through ecological, civil, and sociocultural processes.

locus, maximization of the sum of discounted QOL over time requires increasing tourism. To the right of this locus, maximization requires decreasing tourism. Only for points where $\dot{V} = 0$ is there no incentive to either increase or decrease tourism in order to maximize QOL. Fully sustainable, steady-state solutions in Fig. 33.2 are characterized by the solution where both $\dot{A} = 0$ and $\dot{V} = 0$; this occurs only at point C. At point C, the present value of community QOL is at a maximum level over time, given the constraint that both tourism (V) and community assets (A) are sustained at a fixed level indefinitely. Optimal paths to the steady-state solutions are given by the bold dashed arrows in Fig. 33.2. These show approaches to the optimal, sustainable tourism solutions that maximize community benefits. Based on the characteristics of the stylized model, every possible starting point for A will be associated with at most one possible path to optimal sustainable outcome C.⁷

In the abstract and simple form presented above, the dynamic model and phase diagram offers insights relevant into long-term sustainable tourism development. If one accepts the assumptions upon which the model is built, the steady-state implications follow necessarily; they are not contingent upon conditions present in a particular region or empirical case study. The capacity to transcend limited case-study evidence and provide general results applicable over a wide range of conditions is one of the primary strengths of such models. The model shows that steady-state tourism sustainability may be viewed as the combination of (33.1) a steady state of community environmental, sociocultural, and economic assets ($\dot{A} = 0$) with (33.2) a situation in which there is no quality-of-life incentive to alter the quantity of tourism ($\dot{V} = 0$). While many points satisfy either the first or second criteria for steady-state sustainability (all points along the respective curves), only one (in the present illustration) satisfies both (point C). Moreover, there are distinct and optimal approach paths to this sustainable outcome; deviations from these paths result in either a loss of community benefits, a collapse of tourism, or (more likely) both.

Among the insights gained through such an exercise is a perspective of tourism as a dynamic system that incorporates coupled human and natural elements. Each of these elements is governed by processes that can, in some cases, be empirically approximated and that determine the relationships to other elements in the system. One cannot change one element of the system without concomitant impacts elsewhere. This helps explain why common simplified approaches to tourism sustainability that emphasize only a portion of the integrated system (e.g., ecological sustainability) while giving less attention to others (e.g., sociocultural sustainability) may generate unintended and undesirable consequences. As noted by McKercher (1999), “tourism is an inherently non-linear, complex and dynamic system” in which – to be successful – adaptive management must account for the dynamics of often complex economic, environmental, and social systems (Schianetz et al. 2007). While these coordinated systems are often uncertain and/or unpredictable, simulations of their dynamics can assist policy makers characterize policies that are more likely to promote desirable and sustainable outcomes. Without such insight, even well-intentioned policies may have unforeseen consequences.

For example, a policy that seeks to maintain an overly pristine and undisturbed level of community environmental and sociocultural assets may be just as unsustainable – from the perspective of residents – as a policy that causes excessive damage. Consider a policy that attempts to maintain at asset level of A_1 in Fig. 33.2, by starting at point H on the $\dot{A} = 0$ curve, where natural renewal exactly balances visitor damage. Such policies will result in a long-term loss of QOL to local residents, compared to that which could be achieved were tourism to follow a more optimal path from the starting point (e.g., starting at F with gradual decreases in tourism and community assets over time, ultimately leading to steady-state saddle point C). The reason is that nonoptimal paths sacrifice economic benefits to an excessive degree. Within our simple model, from a starting

⁷ An equilibrium point, such as C, is known as a saddle point (Chiang 1992).

point of H dynamic paths lead to unsustainable diminishment in visitor numbers (i.e., the community would ultimately drive the number of visitors to zero), leading to a decline in economic benefits and a long-term loss of associated QOL relative to that which could be achieved at point C. Hence, compared to that which is maintained in optimal sustainable solutions, the level of community environmental and sociocultural assets can be either *too high* or *too low*. The careful balance that must be achieved in both sustaining the environment and sustaining a viable tourism industry (and local population) is one of the key illustrations of the model.

Two variable phase diagrams are particularly useful when describing qualitative results when general functional forms are used and the time horizon is infinite (Chiang 1992, p. 117). While all the paths pictured in the figure satisfy optimal decision making over time, the stable branches leading toward the saddle point equilibrium are the only ones that also satisfy certain initial and terminal value pairs of A and V (those that happen to lie along the path from E to C). The phase diagram is also useful in explaining shorter planning periods for communities not on the stable branch (i.e., a branch that leads to a stable or sustainable outcome such as C).⁸ The simple model, however, does not allow one to address different patterns in exploitation and recovery across different types of community assets. Nor does it provide insight into the more specific types of trade-offs that might be implied in movement toward a steady-state sustainable outcome – whether starting on or off of a stable branch.

The next section of this chapter, “Tourism and QOL: Economic, Environmental, and Sociocultural Trade-offs,” provides a more in-depth exploration of some of these issues, extending the general model presented above. We analyze one segment of one of the paths (not necessarily on a stable branch) and how a community might use tourism growth and specific goals for social, economic, and environmental assets to move the community toward the steady-state equilibrium. This model still falls short of providing a single, universal formula for optimal tourism development but illustrates a further step in its development. It includes a specific functional form for the triple bottom line, a finite 30-year time period, and target terminal levels of environmental, social, and economic assets to be left for generations that outlive the planning period. That is, it allows one to assess trade-offs among different factors influencing QOL (X , S , and E), rather than focusing purely on a more aggregated index of community assets (A). It also allows for different responses of each of these indicators to tourism patterns.

Tourism and QOL: Economic, Environmental, and Sociocultural Trade-offs

The model defined above assumes a simple, abstract form for community QOL, $L = L(V, A)$. That is, QOL is a mathematical function of the quantity of tourism (V) and an index of combined environmental, sociocultural, and economic assets (A); these combine to determine the benefits of tourism and QOL. This implies at least some degree of substitution in tourism outcomes. For example, one might obtain equivalent aggregate QOL from policies that improved either environmental, sociocultural, or economic assets in a community. Similarly, one might obtain equivalent benefits, at least in the short run, from policies that encourage immediate returns from tourism at a cost of some asset degradation. Given the flexibility implied in the general form of $L(V, A)$, many of these possibilities will be fully consistent with the types of optimal paths identified

⁸According to the Catenary Turnpike Theorem (Samuelson 1965), the longer the time period being considered, the more the optimal paths will arch toward the stable branch to the steady state.

above and shown in Fig. 33.2. That is, optimal paths to the steady state may be achieved with a variety of possible outcomes for community assets and economic returns. Hence, in order to provide the most relevant insight, it is necessary to further explore functional relationships within the general tourism benefit function $L(V, A)$.

Although the specific form of $L(V, A)$ will differ across communities, illustration of possible structures for this function can provide insight into the types of trade-offs and patterns which can occur. This section explores a specific possible function defining community QOL, $L(V, A)$, and the implication of this structure for the role of tourism in sustainable community development. The purpose is to illustrate the trade-offs implied in various paths to sustainable tourism and the various combinations of community assets that may be used to promote community QOL for the current generation and allow a bequest of assets for the next.

We begin by disaggregating the combined index of community assets A into three subindices characterizing community economic (E), sociocultural (S), and environmental (X) assets. From here, we propose a simple multiplicative form for A :

$$A = XSE. \quad (33.5)$$

Equation 33.5 indicates that the community's sociocultural (S), environmental (X), and economic assets (E) all contribute positively to community assets and positively influence the contributions of each other. It also assumes that X , S , and E are perfect substitutes, and that reductions in one can be offset by gains in another. As we will see in the illustration, this assumption may be unrealistic under certain conditions, such as when extremely low values of X and S can be offset perfectly by very high values of E .

The specific functional form through which tourism V influences L is assumed to be

$$L = L(V, A) = V^\beta A = V^\beta XSE \quad (33.6)$$

where β is an exogenous model parameter that describes the overall influence of visitors on the quality-of-life in the community. When $\beta > 0$, an increase in visitor numbers will have a positive overall effect on current quality of community life; when $\beta = 0$, visitor numbers have no effect on current quality-of-life; and when $\beta < 0$, an increase in visitors will have a negative effect on community quality-of-life. The usual assumption is that visitors contribute positively, particularly through jobs, wages, and taxes. This suggests that $\beta > 0$, but this effect might be modest when tourism is a small part of the economic base.

The following illustration simulates tourism-related community development where quality-of-life is characterized by Eq. 33.6. For simplicity, we set $V = 1$ at the beginning of the simulation as the index value for the current level of tourism in the community. We set β to 0.05, suggesting that a 1% increase in V will cause an immediate 0.05% increase in L . V will also affect L through its influence on the growth or decline in community assets X , S , and E . While Eq. 33.2 represented the dynamic behavior of the composite asset index A , here we formulate separate equations for each asset in order to capture their different dynamics. To mirror the general properties of the growth function shown in Fig. 33.2, a simple environmental asset equation is specified as

$$\dot{X} = \frac{\partial X}{\partial t} = \gamma_X A \left(1 - \frac{X}{\bar{X}} \right) + \delta_X V \quad (33.7)$$

where the subscripts X on γ and δ identify these as parameters of the environmental equation (not as derivatives with respect to X , as shown above).

Equation 33.7 suggests that the level of the environmental quality asset X will increase at faster rates at higher levels of overall community asset quality $A = XSE$, but that this rate will

decrease as environmental quality approaches its capacity level.⁹ The equation also implies that social and economic assets of the community will support growth in the environmental asset, e.g., when the overall community assets are high, it can invest more heavily in environmental assets for the future. Such assumptions reflect patterns assumed in the often-cited but controversial environmental Kuznets curve, in which income growth beyond a certain point is hypothesized to improve environmental quality over time (Dasgupta et al. 2002). The last term in Eq. 33.7 reflects the direct influence of visitors on the asset. This is usually considered to be a negative influence (Williams 1994; Davies and Cahill 2000). Examples would be a reduction in the quality of a community park due to wear and tear on foot or bike paths, unwanted picking of flowers or other damage to vegetation, disturbance to sensitive wildlife species, or the pollution of a stream by visitors. Here such effects are modeled as a constant impact per visitor δ_x .

The differential equations governing growth of the other assets that contribute to community quality-of-life (S and E) mirror the general form of (33.7), but with a different natural resilience parameter (γ) and different relationship to visitor numbers (δ):

$$\dot{S} = \frac{\partial S}{\partial t} = \gamma_s A \left(1 - \frac{S}{S} \right) + \delta_s V_t \quad (33.8)$$

$$\dot{E} = \frac{\partial E}{\partial t} = \gamma_e A \left(1 - \frac{E}{E} \right) + \delta_e V_t \quad (33.9)$$

Each of these equations could be further tailored to the characteristics of its own system and/or motivated based on empirical research at any given site. Many relationships are possible between growth of each asset and its level. We have used the same functional form for each asset for easier exposition and development of analytical solutions.

Illustration of quantitative model outcomes requires parameterization of the model or the provision of values for each model parameter. Within an actual planning process for a tourism destination, these parameters would be chosen based on factors that might include primary empirical research, local expert opinion, or the use of empirical results established elsewhere. Here, we choose simple illustrative parametric values to illustrate the types of general results and scenarios which can emerge.

To parameterize the model, we first initialize social and environmental assets at 1 in the current period; the economic index is set at 0.75, reflecting a depressed local economy. We set the natural limiting capacities of each asset index at 2. This implies that environmental and social assets are currently $\frac{1}{2}$ of their carrying capacity; economic assets are currently $\frac{3}{8}$ of their analogous limiting value. As mentioned above, we assume $\beta=0.05$. In addition, we assume $r=0.01$ to reflect a low social discount rate for our hypothetical community (i.e., it highly values the future). We assume $\gamma_x=0.01$, $\gamma_s=0.015$, and $\gamma_e=0.005$, indicating that social assets recover or grow most rapidly, followed by environmental assets and finally economic assets.¹⁰ We set $\delta_x=-0.004$ and $\delta_s=-0.003$ to reflect a small but negative impact of visitors on environmental and social assets.¹¹ We set $\delta_e=+0.01$ to reflect a net contribution of visitors to economic development

⁹More complex formulations could include a variety of characterizations, for example, the possibility of community investment in capacity (e.g., establishment of parks and open space in degraded areas).

¹⁰For example, at initial levels of V , X , S , and E , the endogenous growth in X will be $0.01 \times 0.75 \times (1 - \frac{1}{2}) = 0.00375$.

¹¹For example, when V is at its current level of 1, endogenous growth will be reduced by -0.004 on the margin, and environmental assets will experience a net change of -0.00025 .

at a higher rate than endogenous economic growth. This system of equations suggests overall growth in all asset levels as they interact.

Based on these assumptions, Fig. 33.3a, b, and c illustrate three different simulated time paths¹² of each of the community assets and the time paths of the composite index A . Table 33.1 shows the differences in each of the community asset levels, quality-of-life (L), and the present value of its sum ($\sum L e^{-rt}$) over the 30-year simulation period. The second column shows the initial level of assets and QOL. The scenarios differ according to the assumed growth in visitors and imposed constraints on the quantity of assets remaining for future generations at the end of the simulation period.

The initial scenario shows trajectories when V is held constant at current level of 1.0, reflecting a policy of constant visitor numbers. In this scenario, changes are due solely to endogenous growth of the three types of assets. The third column of Table 33.1 shows that holding V at a constant level of 1.0 over 30 years will result in a slight increase (3%) in environmental assets, a 12% increase in social assets, and a 51% increase in economic assets (1.13/0.75). Combined assets (A) and QOL (L) increase 73% (1.30/0.75). The modestly optimistic behavioral parameters in this case result in a positive change in all aspects of community development.

The fourth column in Table 33.1 illustrates an alternative scenario that assumes growth in visitors of 241% over 30 years. This reflects the optimal level of per year visitor growth in the model (0.08/year from a baseline value of 1.0), or the level that maximizes QOL over the 30-year planning horizon subject to the constraint that $X \geq 1$, $S \geq 1$, and $E \geq 1$. These constraints reflect the minimum asset levels that the current generation wishes to bequeath to the next generation (i.e., at the end of the 30-year simulation period). In contrast to the scenario with zero visitor growth, this alternative scenario shows a 96% increase of community economic assets (1.47/0.75), which increases overall assets (A) by 81% despite a decline in environmental assets of 10% and relatively unchanged social assets (+3%). This illustrates how trade-offs between economic and other assets are influenced by visitor growth. Despite strong economic gains and large increases in visitor numbers, the gain in quality-of-life for the current generation is only modest compared to the constant visitor scenario. The sum of discounted values of quality-of-life is slightly higher in the second scenario (+6.8%); however, it results in a much different portfolio of community assets after 30 years.

The last column of Table 33.1 illustrates a third scenario that assumes growth in visitors of 481% over 30 years, twice the rate of visitor growth as the second (optimal) scenario. This reflects the visitor growth of 0.16/year from a baseline value of 1.0. This growth rate does not respect constraints on qualities of life that the current generation wishes to bequeath to the next generation. This scenario shows a 141% increase of community economic assets, which increases overall assets (A) by 73% (compared to 81% in the previous scenario) because of a decline in environmental assets of 23% and a decline in social assets of 7%. Discounted QOL over the 30-year simulation is still slightly higher than in the second scenario with lower visitor growth (27.91 versus 27.18). However, both the level and growth in total assets A at year 30 is lower (i.e., the A curve is flatter and lower in Fig. 33.3c than in Fig. 33.3b), suggesting the costs that will be imposed on future generations as a result of too-rapid visitor growth. The effects of diminished assets (relative to the second scenario) can also be seen in the QOL at year 30, which is lower in the rapid-growth scenario (1.42 versus 1.45). This scenario illustrates how quality-of-life for the current generation can be enhanced by sacrificing the assets, and hence QOL, bequeathed to the next generation.

¹²We have used the obvious difference equation equivalents for the differential equations for the simulations.

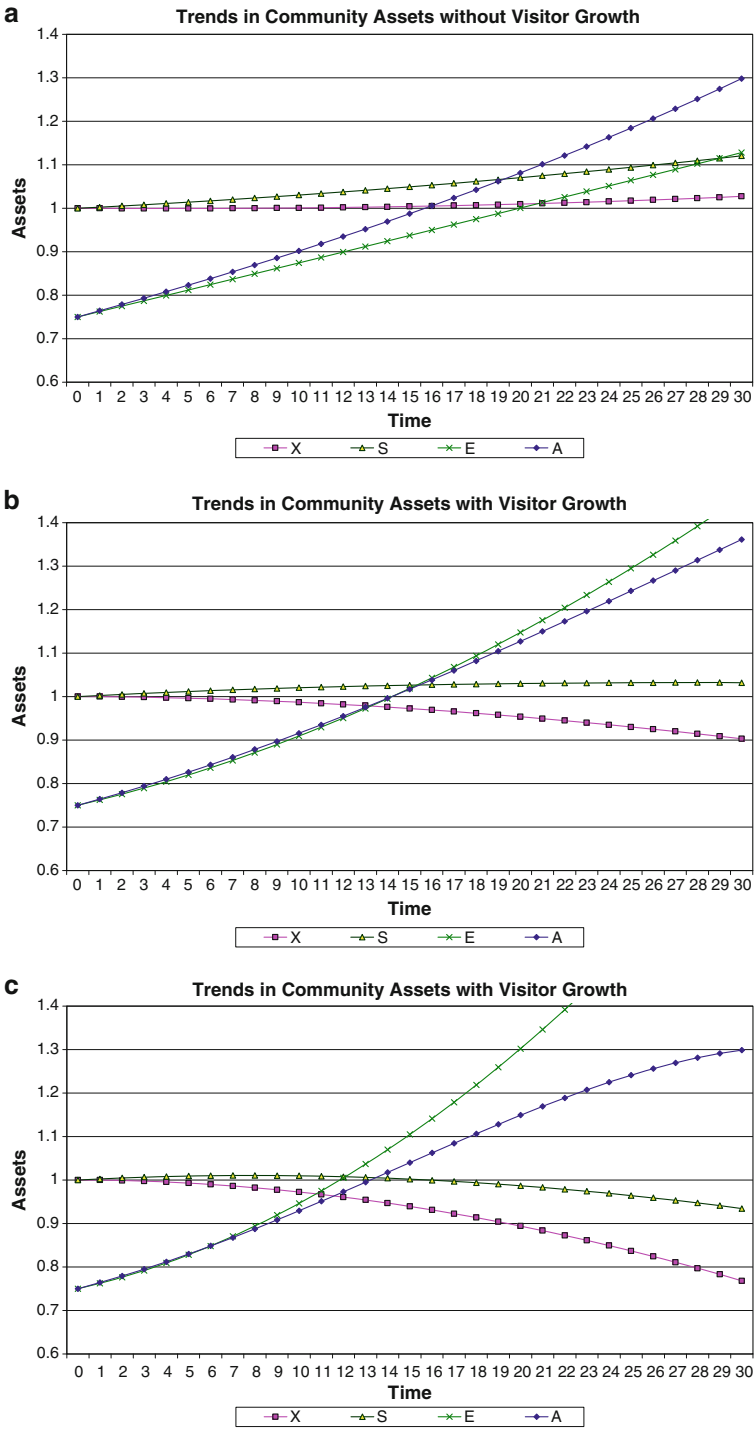


Fig. 33.3 (a) Paths of community assets without visitor growth. (b) Paths of community assets with visitor growth of 0.08/year. (c) Paths of community assets with visitor growth of 0.16/year

Table 33.1 Levels of community assets at beginning and end of period

Asset	$T=0$	$T=30$	$T=30$	$T=30$
Levels	–	$\Delta V=0$	$\Delta V=0.08$	$\Delta V=0.16$
X	1.00	1.03	0.90	0.77
S	1.00	1.12	1.03	0.93
E	0.75	1.13	1.47	1.81
A	0.75	1.30	1.36	1.30
L	0.75	1.30	1.45	1.42
$\sum Le^{-rt}$		25.45	27.18	27.91

Optimal Tourism Development for Sustainable QOL

The objective of tourism planning specified by Eq. 33.1 is to maximize the long-term discounted value of the quality-of-life for community residents by determining the time path of tourism development. The phase diagram (Fig. 33.2) suggests that a steady state where assets remain unchanged exists and provides a viable target. Simulation results illustrated in Fig. 33.3a, b, and c were determined by the parameters chosen to characterize one possible type of community dynamics over 30 years. They are not intended as predictions for any specific community but as an illustration of the implications of trade-offs among different community assets and QOL. Since paths describe changes over only 30 years, they do not illustrate the achievement of a steady state of asset levels and visitor numbers.¹³ Results illustrate that tourism can have different effects on different types of community assets and that the same overall quality-of-life objectives can be met by several different combinations of asset accumulation.

As noted above, the growth of 0.08/year in the visitor index illustrated in the second scenario was chosen because it maximizes Eq. 33.1 over the 30-year period subject to a specific set of bequest values, or values of assets remaining for future generations. However, a steady-state solution to the problem of controlling the community system using tourism would involve optimization over many more periods of growth.¹⁴ For both long-term and short-term analyses, this optimization requires that a balance be maintained between the current (immediate) impacts generated by visitors and impacts on assets. This condition may be derived from Eqs. 33.1 to 33.7 above and implies that in each period:

$$\beta AV^{\beta-1} e^{-rt} + \delta_X \lambda_X + \delta_S \lambda_S + \delta_E \lambda_E = 0. \quad (33.10)$$

Here, λ_X , λ_S , and λ_E represent the marginal values of environmental assets X , S , and E over time, or what the marginal unit of each asset is “worth” to the community, in terms of the present value of their future contribution to QOL.

Equation 33.10 implies that the marginal gains to current quality-of-life in any period represented by the first term should just balance the sum of the marginal value impacts on the community assets. Choosing visitor numbers according to this condition of balance guarantees that the visitor number control will be used to effectively maximize the sum of discounted

¹³The trajectories only begin to show signs of stability as they near the 30th year.

¹⁴While the problem for a longer period is mathematically solvable, it is unlikely that any set of asset parameters would be constant over such a long period. In addition, it is unlikely that the quality-of-life index for the current generation would be equally relevant for future generations. While the long-term goal of steady-state sustainability can provide a valuable philosophical base for community planning, short- and intermediate-term decisions will likely be based on returns to the current generation and their desire to bequeath community assets to the next generation.

quality-of-life values for the current generation over the period. Intuitively, Eq. 33.10 shows that under optimal policy that maximizes QOL, visitation will only be increased to a level where the resulting gain in immediate quality-of-life is exactly equal to the associated net loss in the present value of future QOL changes related to the associated asset changes.

Model results also imply a limitation on the level of community development, quality-of-life, or asset levels that can be achieved through tourism alone. In our illustrative 30-year model, the quality-of-life index level that could be achieved without visitor growth was 1.30 (relative to a present value of 1.0), and the maximum that might be achieved with optimal visitor growth of 0.08/year is 1.45. If the community has a higher quality-of-life or asset goals, then other community development controls must be used. That is, regardless of the number of visitors, there is a limit to the community benefits which can be provided by tourism.

Trade-offs between QOL and preestablished goals for environmental, sociocultural, or economic assets are illustrated in a second simulation scenario. Suppose, for example, that community has a different set of preestablished goals for community assets that include 1.0 for environmental assets (maintaining the current level of environmental quality), 1.5 for social assets (a 50% improvement), and 1.25 for economic assets (a 67% improvement from current levels of 0.75 but only 25% above past levels of 1.0). The implied overall community asset target level A is 1.875. Using the optimal growth rate in numbers of visitors illustrated in Fig. 33.3b, this level of aggregate assets (i.e., $A = 1.875$) can be reached in 48 years. However, this will not achieve the preselected balance of assets indicated above ($X = 1.0$, $S = 1.5$, $E = 1.25$). If the community required asset levels closer to this specific balance, it would require visitor growth of 0.0065/year – less than one-tenth of the rate that maximizes QOL. Even then, the best the community could do through tourism policy alone would be $X = 1.02$, $S = 1.11$, and $E = 1.16$ by the same time period. That is, fixed goals for these assets (other than those that would otherwise occur along the optimal path) imply unavoidable losses of QOL over time. Further improvement would require contributions from sources exogenous to tourism.

Further refinements to such a model would require detailed empirical information for specific tourism destinations. Even then, it is important to recognize that any model is a simplification of reality designed to provide useful insight into certain fundamental features. Given the complexity and uncertainty involved in tourism dynamics, it will likely never be possible to predict with certainty tourism outcomes for any individual destination (Schianetz et al. 2007). Nonetheless, results such as these characterize the types of unavoidable dynamics and trade-offs that are implied within planning for any community influenced by tourism, and ways in which quantitative models can help reveal insights unavailable from a more casual treatment of tourism sustainability. The common failure of tourism destinations to promote sustainable outcomes and long-term improvements in community QOL, replaced instead with the well-established rise and fall evolution of tourism destinations (Butler 1980), suggests that such insights are still needed.

Conclusions

Discussions and analysis of QOL are well established in the tourism literature. TBL accounting frameworks have also previously been proposed as a mechanism to promote sustainable tourism (e.g., Faux 2005; Dwyer et al. 2005). Existing approaches, however, rarely provide comprehensive quantitative frameworks through which tourism or community planners may begin to explore the optimality of explicit trade-offs between different community assets that contribute to QOL, or through which a TBL framework might be operationalized as a formal tool for tourism planning rather than as a general metaphor for business performance. That is, existing approaches fail to link indicators and approaches for measuring TBL performance and sustainability with quantitative models capable of characterizing the dynamics of change in tourism conditions over

time. The models presented in this chapter, while requiring many simplifications to promote tractability and communicability, are designed to illustrate the types of frameworks that might be applied to merge these two themes in tourism analysis to provide more comprehensive insight.

While the challenges facing an application of these theoretical tools to a specific tourism planning problem are not trivial, tools exist to accommodate most empirical needs. For example, choice modeling methods (Bennett and Blamey 2001; Louviere et al. 2000) provide established mechanisms through which one could quantify the importance of community characteristics, assets, and other tourism outcomes for benefits received by residents and visitors, as reflected here in the general function $L(\cdot)$. For an application of such tools in the tourism management literature, see for example Huybers and Bennett (2003) and the review of Crouch and Louviere (2001). As noted above, there are many examples of indicators used to characterize various aspects or determinants of community QOL (e.g., Deery et al. 2005; Neal et al. 2004; Choi and Sirakaya 2006), providing insights that could be used to populate indexes, such as X , S , and E . Finally, standard statistical methods can be used to quantify relationships between the quantity of tourism (e.g., number and type of visitors) and impacts on such indicators (e.g., Tyrrell and Johnston 2009), providing a mechanism to populate growth functions (33.7)–(33.9).

Even without such empirical estimates, results of such models can provide a number of insights relevant to the search for sustainable tourism outcomes that seek to improve community QOL. The theoretically derived long-term solution to the community development model with a single asset and single visitor control suggests the types of approaches necessary to stay on a stable path toward a steady-state solution, and suggests that departures from these paths – even if well intentioned – can lead to perhaps inexorable downward trends in long-term QOL and/or tourism. Results also show mathematically how and why communities cannot “have it all”; linkages between community assets, tourism, and QOL imply that policies to influence one of these elements will have likely unavoidable impacts on the others. So, for example, in the absence of nontourism exogenous forces, a policy that seeks to obtain a predetermined level of community environmental, sociocultural, and economic assets will likely sacrifice long-term community QOL in order to achieve these predetermined goals. Conversely, policies to maximize community QOL may require flexibility to allow required changes in community assets (either increases or decreases). Application of dynamic analysis to shorter-term planning with multiple assets provides additional insight into sustainability planning, with a particular emphasis on trade-offs among different types of community assets and on changes in asset values and QOL over time.

Together, these analyses suggest a set of general insights for sustainable tourism planning. For example, results show that in order for tourism to be both sustainable and to promote long-term community QOL, tourism planning must balance the direct contributions of tourism to the current QOL against its influences on community assets (which influence future QOL). The formal interplay between tourism sustainability and productive capital assets has been discussed by Collins (1999) and Johnston and Tyrrell (2005), among others, but is still not widely reflected in quantitative models within the tourism literature. Tourism development policies must also consider the relative benefits provided by different types of community assets (e.g., environmental, sociocultural, economic) when evaluating policies and investments. Moreover, the possible existence of only a limited number of optimal paths to sustainable outcomes demonstrates formally that the tourism industry may need to sacrifice its own near-term development (e.g., tourism growth) in favor of community development as measured by the quality-of-life for residents and intended sustainability goals. Less myopic perspectives that balance the long-term costs and benefits of tourism development are much more likely to promote community prosperity. Finally, depending on the dynamics governing tourism growth and QOL in any given area, the tourism industry may not be able to achieve the full range of community goals by itself. It is likely that tourism development must be complemented by contributions from other sectors in order to promote all desired outcomes. While none of these insights are particularly surprising, the presented models offer a degree of quantitative rigor and formality absent from most prior

treatments of tourism sustainability. They also provide at least a prospective framework from which to explore specific empirical patterns relative to these insights, in a way that can provide concrete guidance for future tourism and community development.

Appendix

$$\int_0^{\infty} [L(V, A)] e^{-rt} dt$$

$$A = XSE$$

$$L = L(V, A) = V^{\beta} A = V^{\beta} XSE$$

$$H = V^{\beta} A e^{-rt} + \lambda_x \left(\gamma_x A \left(1 - \frac{X}{\bar{X}} \right) + \delta_x V \right) + \lambda_s \left(\gamma_s A \left(1 - \frac{S}{\bar{S}} \right) + \delta_s V \right) + \lambda_e \left(\gamma_e A \left(1 - \frac{E}{\bar{E}} \right) + \delta_e V \right)$$

$$\dot{X} = \frac{\partial X}{\partial t} = h_x - g_x(V) = \gamma_x A \left(1 - \frac{X}{\bar{X}} \right) + \delta_x V_t$$

$$\dot{S} = \frac{\partial S}{\partial t} = \gamma_s A \left(1 - \frac{S}{\bar{S}} \right) + \delta_s V_t$$

$$\dot{E} = \frac{\partial E}{\partial t} = \gamma_e A \left(1 - \frac{E}{\bar{E}} \right) + \delta_e V_t$$

$$\begin{aligned} \dot{\lambda}_x &= -\frac{\partial H}{\partial X} = \left[-L_x e^{-rt} - \lambda_x \left(\frac{\partial h_x}{\partial X} \right) - \lambda_s \left(\frac{\partial h_s}{\partial X} \right) - \lambda_e \left(\frac{\partial h_e}{\partial X} \right) \right] \\ &= -\left[V^{\beta} \frac{A}{X} e^{-rt} + \lambda_x \gamma_x \left(A \left(-\frac{1}{\bar{X}} \right) + \frac{A}{X} \left(1 - \frac{X}{\bar{X}} \right) \right) + \lambda_s \gamma_s \frac{A}{X} \left(1 - \frac{S}{\bar{S}} \right) + \lambda_e \gamma_e \frac{A}{X} \left(1 - \frac{E}{\bar{E}} \right) \right] \\ &= -\frac{A}{X} \left[V^{\beta} e^{-rt} + \lambda_x \gamma_x \left(-\frac{X}{\bar{X}} \right) + \lambda_x \gamma_x \left(1 - \frac{X}{\bar{X}} \right) + \lambda_s \gamma_s \left(1 - \frac{S}{\bar{S}} \right) + \lambda_e \gamma_e \left(1 - \frac{E}{\bar{E}} \right) \right] \\ &= -\frac{A}{X} \left[V^{\beta} e^{-rt} - \lambda_x \gamma_x \frac{X}{\bar{X}} + \Phi \right] = -\frac{L e^{-rt}}{X} + \lambda_x \gamma_x \frac{A}{\bar{X}} - \Phi \frac{A}{X}, \end{aligned}$$

$$\text{where } \Phi = \lambda_x \gamma_x \left(1 - \frac{X}{\bar{X}} \right) + \lambda_s \gamma_s \left(1 - \frac{S}{\bar{S}} \right) + \lambda_e \gamma_e \left(1 - \frac{E}{\bar{E}} \right)$$

$$\dot{\lambda}_s = -\frac{\partial H}{\partial S} = -\frac{A}{S} \left[V^{\beta} e^{-rt} - \lambda_s \gamma_s \frac{S}{\bar{S}} + \Phi \right]$$

$$\dot{\lambda}_e = -\frac{\partial H}{\partial E} = -\frac{A}{E} \left[V^{\beta} e^{-rt} - \lambda_e \gamma_e \frac{E}{\bar{E}} + \Phi \right]$$

$$\frac{\partial H}{\partial V} = \beta A V^{\beta-1} e^{-rt} + \delta_x \lambda_x + \delta_s \lambda_s + \delta_e \lambda_e = 0$$

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Chapter 34

Exploring the Causal Nexus of Tourism Impacts on Quality-of-Life

Jeffrey Michael Rempel

Introduction

Tourism development should be managed at a regional scale within the context of sustainability science and in consideration of quality-of-life (QOL) as perceived by the local community. Tourism is now the largest single economic sector in the world (Davenport and Davenport 2006) and can cause adverse impacts as well as promote sustainable natural resource management. This analysis addresses the research question: How can tourism be developed while sustaining QOL? The first objective is to determine the various impacts of tourism in the region, integrating three approaches: bottom-up, top-down, and scientific literature. The second objective is to understand local perceptions of tourism impacts in the region as well as perceived importance including a determination of what impacts are perceived to exist by local residents. And last, a synthesis of perceptions and management tools that will guide government agencies and tourism industries in advancing sustainability for regional tourism development and the protection of QOL.

The concept of “sustainable tourism” is not clearly defined. This is problematic for tourism planning. To address this gap, a novel approach to tourism management will be presented using a combination of adaptive management, a modified DPSIR (driver, pressure, state, impact, response) approach based on community perception and factor analysis to provide a framework for sustainable tourism development.

The concept of “sustainable development,” which will be used synonymously with “sustainability” for this analysis, has been the subject of debate since its inception with the publication of “Our Common Future” (Brundtland Commission 1987). It involves the integration of sociocultural, economic, and environmental impacts which have a strong influence on nearly all aspects of QOL. With attempts at pragmatic application of the concept of sustainability, it has become evident that it is not an achievable endpoint, but instead is a process (Farrell and Twining-Ward 2005; UNEP 2005) of continuously improving our understanding of the complex, dynamic and coevolving relationship between humans and the ecosystem (Farrell and Twining-Ward 2004). Thus, the concept of sustainable development, as applied to tourism, is about an evolving understanding of the complex and dynamic relationships between various parts of the social-ecological system. Sustainable development of a complex adaptive tourism system requires region-specific

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knowledge of impacts and activities, including local community perception of QOL. Integration relates to understanding the interrelationships and common origin of pressures impacting a tourism system and should follow a systems approach (Schianetz and Kavanagh 2008). Ultimately, tourism needs to be managed so that it provides net socioeconomic benefits to the locals and does not undermine the ecosystems that make it possible. However, “measurement” of sustainability is not straightforward as it is an approach and not an endpoint. Furthermore, the science of sustainability assessment is not as developed as other forms of assessment, for example Environmental Impact Assessment and Strategic Environmental Assessment (Gasparatos et al. 2007).

An in-depth look at perceived impacts on QOL from tourism is needed to ensure the generation of positive and mitigation of negative impacts. It is important to recognize that human beings define their environments, both natural and social. Furthermore, it is human beings who define what constitutes an environmental problem (IHDP 2009) and what influences their QOL. This is especially true in the context of a tourism system. This analysis seeks (1) to address the need to understand local perception of positive and negative tourism impacts and (2) to integrate established methodology (factor analysis, DPSIR, and adaptive management) using a systems perspective, such that management, by both the public and private sectors, can lead to sustainable tourism development.

The United Nations World Tourism Organization (UNWTO) is a global authority in sustainable tourism theory and practice. Their mission statement is:

To promote the sustainable development and management of tourism... involving both public and private sectors for the generation of social, economic and cultural benefits for host communities... for ensuring the supply of quality tourism products and avoiding or reducing negative impacts upon the natural and socio-cultural environments (UNWTO 1999).

Benefits as well as negative impacts can be region specific. Thus, sustainable tourism development requires both the participation of stakeholders and strong political leadership to achieve consensus. Achieving sustainable tourism is a continuous process requiring impact monitoring, preventative and corrective measures, and adaptive management. In addition, tourists should be satisfied with their experience while increasing their awareness of sustainability issues (UNEP 2005).

Gasparatos et al. (2007) discuss a variety of metrics and tools and come to the conclusion that none of them are capable of holistically assessing progress toward sustainability. They assert that “the need to address the multitude of environmental, social and economic issues, together with intergenerational and intragenerational equity concerns, formulates problems that...reductionist approaches can [not] tackle individually in an adequate manner.” Interpretation of integrated tourism sustainability indicators should concentrate on enhancing systems and resilience thinking instead of simply interpreting individual system variables (Schianetz and Kavanagh 2008). There is a need for hybrid methodology, integrating bottom-up and adaptive management, that can be used by non-experts to reduce indicator lists systematically to include all essential indicators from a systems perspective to increase understanding of system behavior (Schianetz and Kavanagh 2008). Thus, a bottom-up community-based QOL approach, combined with a top-down approach and augmented with literature, will be the focus of discussion for this chapter. The approach uses factor analysis to systematically reduce indicators and understand the causal nexus within the complex adaptive tourism system, making it well suited for DPSIR analysis.

As we progress into the Anthropocene, societal evolution necessitates a paradigm shift that recognizes human dependence on the ecosystem and the ecosystem services (i.e., nature-based tourism) that it provides. Furthermore as society gets wealthier, demands for ecosystem services will diversify, and impacts on ecosystems will increase (Costanza et al. 1992). Thus, with rising GDP per capita, tourism and recreation will grow, putting further pressure on ecosystems providing these services (Millennium Ecosystem Assessment 2003). Cultural and nature-based tourism highlights the explicit linkages and affinity that exist between economies and ecosystems.

It is people that need to be managed, not the environment, which instead needs to be monitored, analyzed, and understood to facilitate an integration of knowledge on natural and human systems.

Approach

It is communities that should be sustained to support tourism, rather than focusing on sustainable tourism (Potts and Harrill 1998). Community-based management, guided by the Ecosystem Approach which recognizes the importance of communities in planning, is used for this analysis of tourism impacts to QOL. To produce benefits to local communities requires an understanding of what they perceive to be beneficial. Tourism developers and managers must assume that providing benefits to communities includes an element of trust in the community members to know what is best for themselves. However, communities cannot be expected to articulate this information on command. What is needed is an understanding of community QOL value. The approach assessed in the case study assumes that the aggregation of individual value from community members is equal to community value and that by understanding this value, recommendations to manage tourism can be made leading to sustainable development. Of the eight definitions for sustainable tourism listed by Garrod and Fyall (1998), only two specifically mention “communities” and none refer to “planning.” In current literature, the importance of community engagement for sustainable tourism is recognized (Ap 1992; Chan and Huang 2004; Li 2006; Schianetz et al. 2007), but there is debate around the level and type of involvement.

Community residents require sufficient resources and skills to engage themselves in tourism management (Okazaki 2008). Without resources and skills, residents can be powerless and ineffective participants in tourism planning activities (Okazaki 2008). Local resident perceptions of social climate, adverse tourism impacts, and tourism benefits are very important to planning for successful and sustainable tourism development to enhance QOL. The primary reason is the direct influence that locals have on the tourist experience (Okazaki 2008). According to Chan and Huang (2004), a bottom-up perspective, based on local action in a community, is the most appropriate way to address sustainability at the scale of community development. This is supported by the internationally recognized Ecosystem Approach and Agenda 21.

Ecosystem Approach

The Ecosystem Approach is a central component of the integrated approach discussed in this chapter. It was followed in the development of this case study: from research conception to planning and executing methodology and finally in the analysis. It is a strategy for the integrated management of land, water, and living resources that promotes conservation and sustainable use in an equitable way. The framework requires participatory approaches in the development of strategic environmental policy and emphasizes the inclusion of indigenous and local communities (CBD 2008). The participatory approach in this analysis was designed following the Guidelines on Biodiversity and Tourism Development presented by the Secretariat of the Convention on Biological Diversity (2004) which states that management of tourism should be based on a consultative process involving multi-stakeholder participation and should consist of numbers one through six below. Numbers one, two, and four are the focus here while three, five, and six are beyond the scope of this analysis:

1. The development of an overall vision for the sustainable development of tourism activities
2. The setting of short-term objectives to implement the vision

3. The review and building of regulations and tourism standards
4. The assessment of the potential impacts of tourism projects
5. The monitoring of impacts and compliance
6. The implementation of adaptive management in relation to tourism and biodiversity

Case Study: Northern Vancouver Island, Canada

An illustrative case study is presented in sections “[Ecosystem Approach](#)”, “[Economics](#)”, and “[Research Methods and Challenges for Assessing Impacts to Quality-of-Life from Tourism](#)” using theory from the Ecosystem Approach and sustainability science with results from community-based research on the complex and adaptive tourism system of Northern Vancouver Island. Sections “[Desire and Capacity for Tourism](#)”, “[First Nations](#)”, “[Positive and Negative Tourism Impacts](#)”, “[Adaptive Management](#)”, “[Tourism Is a Complex Adaptive Social-Ecological System](#)”, and “[DPSIR Framework](#)” discuss a variety of tools individually and most powerfully when integrated to understand and manage impacts to quality-of-life. Although the context here is tourism, this approach can be pragmatically applied to quality-of-life assessment anywhere in the world.

Vancouver Island is the largest island on the west coast of N. America. It measures approximately 480 km in length and 80 km in width at its widest. Northern Vancouver Island (NVI) is approximately 16,000 km² in size with a population of approximately 10,000 people (BC STATS 2007) or 1.3% of the total for Vancouver Island (750,000). Ecologically, NVI has been labeled by the Nature Conservancy as the Nahwitti Lowlands Ecoregion of the North West Pacific Coast Ecoregion (Vander Schaaf et al. 2006). Typical wildlife includes black-tailed deer, Roosevelt elk, black bear, and cougar as well as a variety of small mammals, birds, and fish. Hunting for bear, deer, and cougar is popular with the NVI community as well as visitors to the region. Along the coasts, including the deeply incised fjords, there are many migratory bird species and rich marine biodiversity with a number of healthy salmon runs (Vander Schaaf et al. 2006). Other marine wildlife attracting tourists include humpback, grey, and minke whales; seals; sea lions; Pacific white-sided dolphins; sea otters; and bald eagles (TVI 2008).

Economics

Knowledge of regional economies should be included in the tourism planning process. Unfortunately, historical patterns of land and resource use are often neglected in development plans and policies (Potts and Harrill 1998). Members of the Northern Vancouver Island Community (NVIC) have traditionally had an economy based on natural resource extraction industries, namely fishing, logging, and mining (RDMW 2002). Due to declines in these industries, NVIC is turning to coastal tourism as an additional sector to diversify and improve the local economy and QOL (RDMW 2008). However, tourism is known to have both positive and negative impacts (e.g., conservation/degradation of natural environment and protection/loss of local cultural identity). Tourism in this region is relatively young and is evolving in a complex and adaptive way impacting and being impacted by other forces in the social-ecological system, making it ideally suited for a research case study of complex adaptive tourism systems (CATS).

The decline in logging, fishing, and mining not only affects individual QOL but ultimately leads to diminished financial capacity of the Port Hardy district. According to the VISLUP (2000), those areas of the island that are more reliant on forestry and other primary industries (e.g., Mt. Waddington Regional District) have been vulnerable to the “boom and bust” cycles of international commodity markets. There are high hopes for tourism to make use of the

recreational and cultural ecosystem services in the region, and the district states that: “Our economy will be based on improving opportunities of being an exciting tourist destination” (District of Port Hardy 2002).

Research Methods and Challenges for Assessing Impacts to Quality-of-Life from Tourism

One of the primary challenges of assessing impacts to quality-of-life from tourism is the determination of what constitutes an impact and then determining if it is significant. The methods used and assessed here include rapid rural appraisal, social science survey methods, structured and unstructured interviews, and data analysis techniques.

The methods section is divided into three subsections. The first section will explain how the impacts to QOL from coastal tourism in the region were determined through a combination of bottom-up and top-down approaches combined with scientific literature. This will be followed by a description of how perception of impacts was solicited from the community using a web survey. And finally, a description of data analysis will be provided, including statistical analysis methods.

Bottom-Up Determination of Impacts

The objective was to identify QOL indicators and discover community perception of positive and negative tourism impacts using a rapid rural appraisal (RRA) approach. RRA is a technique developed in the 1970s and 1980s in response to the perceived problems of outsiders miscommunicating with local people during development work (World Bank 2006; FAO 1989). As part of the RRA, residents were asked to provide their perception of tourism. They were informally queried about positive and negative perceptions of tourism to determine, based on a bottom-up approach, which impacts are important to include in the social science survey. Those residents willing to participate in the RRA, as well as those who indicated they did not have time or were not interested, were asked to provide their email address for participation in a web-based survey.

Top-Down Determination of Impacts

Interviews with key levels of government, NGOs, and key stakeholders are very useful to identify issues critical to understanding tourism impacts from a local perspective for the development of survey questions. For this case study, interviews were completed following a non-structured format to allow all potential issues to be recorded. As hoped, a “snow-ball effect” occurred throughout the interviews in July 2008, where interviewees were able to provide names and contact information for other important people in the region with knowledge of tourism and planning.

Web-Based Survey

Consistency is critical in the execution of surveys. A consistent 5-point Likert Scale was used throughout the survey developed for this case study. The odd number of available responses

provided individuals with the option of selecting a neutral response to those questions which they would not know how to answer otherwise, and is thus expected to minimize frustrations from not being comfortable answering one way or the other. The online survey tool used was “Survey Monkey” (www.surveymonkey.com). Survey questions related to positive and negative impacts were presented in random order, using the random order option in survey design, to avoid ordering biases that may result from the first question being perceived as more important simply because it was presented first. In addition, the questions relating to the three dimensions of sustainability (sociocultural, economic, and environmental) were presented together in two large question matrices, one for positive and one for negative impacts.

Data Analysis Methods

According to Gasparino et al. (2006), converting ordinal scale into integer scores (e.g., -2,-1,0,1,2) is a straightforward and commonly used approach. Empirically, it has been observed that, especially when the number of categories is large, the failure to address the ordinality of the data is likely negligible, and many multivariate techniques provide reliable results despite the ordinal scale being treated as an integer scale. The sum of ordinal-scaled Likert-type variables (taking a suitable code with equal interval lengths) was used to produce variables which could then be compared quantitatively. To determine the most important/least acceptable impacts, the results were summed up, and for comparison of factor groupings based on social, economic, and environmental impact dimensions, the average of impacts within each group was calculated.

Data analysis was completed using Statistical Package for Social Sciences (SPSS). Factor analysis was employed in order to reduce variables into a smaller number of factors to generate a synthetic representation of how the complex system in question is perceived. This allows for an explanation of what is going on in terms of a reduced set of independent and otherwise latent variables. To ensure that only significant results were interpreted, a conservative cutoff of ± 0.5 (or 25% of variance explained) was used.

Factors were labeled using descriptive labels, allowing the content of the factor to be easily remembered in analysis and discussion, compared to assigning symbolic labels with no meaning, e.g., factors 1,2,3, etc., which would require the use of lookup tables or redefinition. Naming the factors is essentially an arbitrary action, and can be seen as the only truly subjective part of the otherwise objective factor analysis method. In this analysis, descriptive labeling is used as it will facilitate more transparent and simple communication and discussion of results with planning managers as well as with community stakeholders.

Results and Discussion

This section will discuss community perception of tourism impacts on quality-of-life. It is important to ensure that the demographics of the sample population obtained show a wide distribution of gender, age, income, education, community residence, and length of residency, thus ensuring representation of the wider community. If the sample is representative, the results presented are useful for understanding tourism based on public perception that can be assumed to represent the wider community and to allow management recommendations to be made accordingly.

Table 34.1 Community desire and capacity for tourism development

Percent	Statement and level of agreement
94%	(Strongly Agree or Agree) that both “I want tourism to increase” and that “tourism is a good thing for the community”
93%	(Strongly Agree or Agree) that “Ecotourism (or Sustainable tourism) operators need to be certified to ensure they do not hurt the local culture and environment”
89%	(Strongly Agree or Agree) that “Community members should be involved in tourism planning”
72%	(Neutral, Disagree, Strongly Disagree) “If I want to get skills to work in tourism, I can easily”
71%	(Neutral, Disagree, Strongly Disagree) that “Training opportunities to get skills for nature and cultural tourism are well known, accessible, and affordable”
69%	(Strongly Agree or Agree) that “I feel a close connection to my community”
62%	(Strongly Agree or Agree) that “I know many people are involved in tourism”
60%	(Strongly Agree or Agree) that “There is a great potential for First Nations cultural tourism”

Desire and Capacity for Tourism

Andereck et al. (2005) found that all but one out of more than 20 case studies analyzed showed that residents overall had positive attitudes toward tourism. The authors found a few negative aspects however, specifically traffic, crime, and litter. The type of tourist visiting an area can affect the way a community perceives tourists especially when there is a great deal of variation between the characteristics of tourists and the community in racial, cultural, and socioeconomic status (Faulkner and Tideswell 1997). To ensure maintenance of a community’s perceived QOL, tourism must be desired, and the community needs the capacity to support tourism.

Community residents’ perception of tourism impacts to QOL can be influenced by the length of time and history of tourism development within a host community (Ko and Stewart 2002). Negative tourism impacts will be greater in a tourist destination at a mature stage of development where the tourism ratio is higher, there is an emphasis on international tourism, and there is higher seasonality (Faulkner and Tideswell 1997). Although seasonality is a problem for NVI tourism, it may be resolved more easily than in highly developed tourism locations, dependent on sun, sea, and sand. This is because NVI tourism depends on nature and culture-based tourism, which tend to be less reliant on the main summer period, as they typically engage older tourists who are not so closely tied to school holidays with their children. In addition, these tourists are less concerned with climate and season than most other tourists.

First Nations

As expected, there is moderately strong agreement with the statement that “There is a great potential for First Nations cultural tourism” with 60% of respondents indicating Strongly Agree (32%) or Agree (28%) (Table 34.1). However, First Nations tourism employment may be impeded by lack of skills such as driving license, boat operator’s certification, and first aid, highlighting the need for training programs. The Kwakiutl of Fort Rupert are globally one of the most well-known indigenous cultures although this name was mistakenly given to all the above-mentioned groups who now are referred to collectively as the Kwakwaka’wakw along with some other groups on the mainland. It is important to include First Nations communities in sustainable tourism planning. Within the Regional District of Mount Waddington, planning for tourism and other forms of development within traditional First Nations areas requires their consultation.

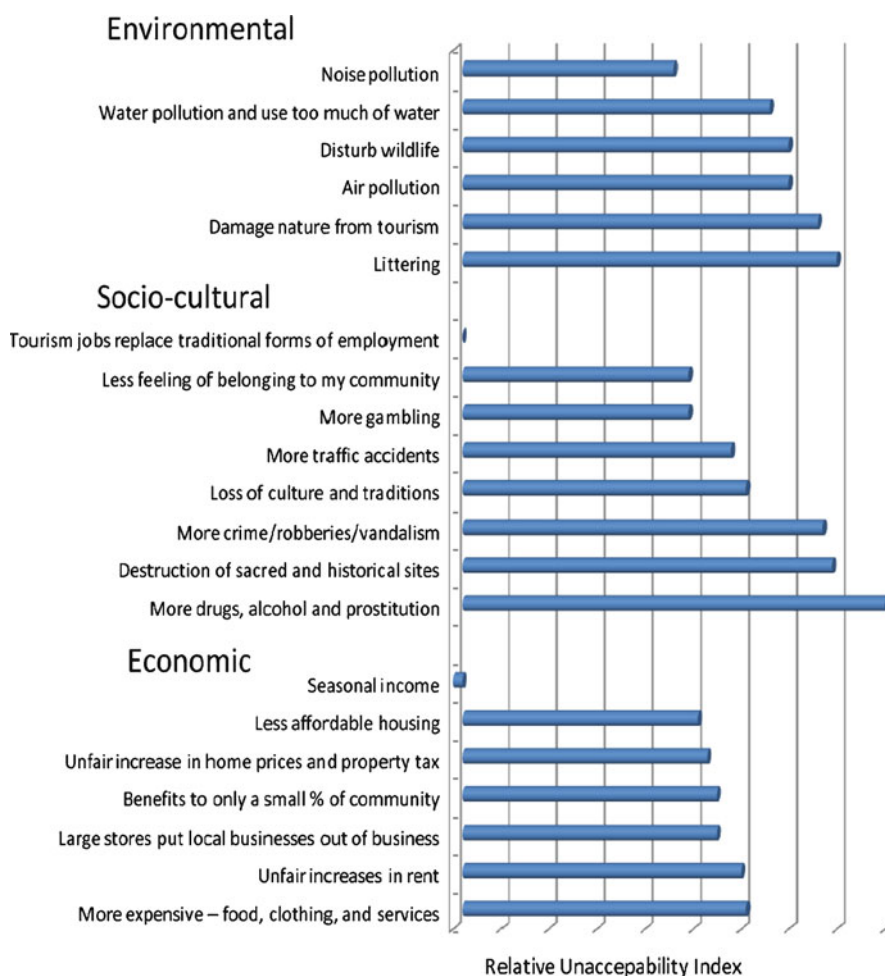


Fig. 34.1 Negative tourism impacts

Positive and Negative Tourism Impacts

This section provides the results of the web-based survey as well as some examples of how it can be interpreted. The discussion here simply states the results whereas the following sections increase in analytical complexity and elucidate interlinkages within the complex and adaptive tourism system in question. It is important to understand the results of this case study, in simple terms as presented here, to move forward and understand the results obtained by statistical factor analysis of this data and furthermore the interpretation of the determined factors in terms of DPSIR.

To start, the most important positive impacts to QOL are those perceived to be most beneficial and should be the focus of tourism operators and local government (Fig. 34.2). It is important to recall that impacts were ranked by applying an interval scale to the ordinal data as described in the methodology section.

The relative summary scores are presented graphically above in Figs. 34.1 and 34.2 according to the original groupings of indicators between sociocultural, economic, and environmental.

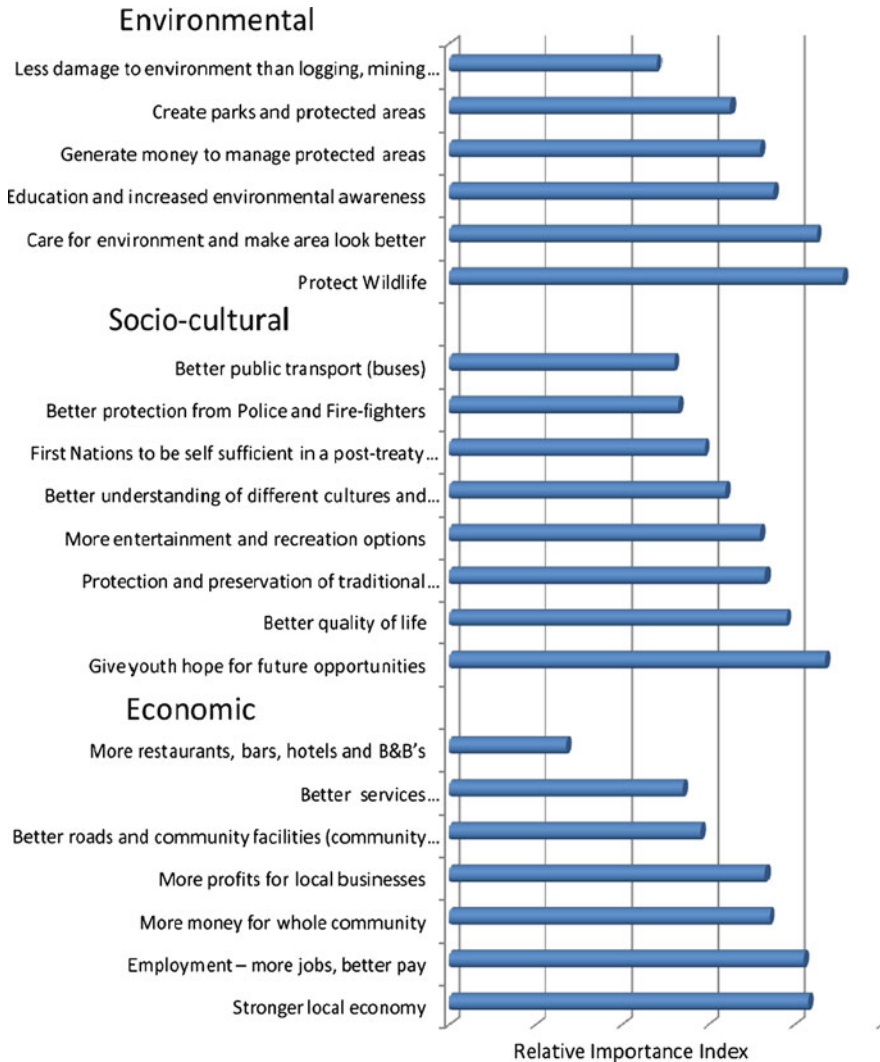


Fig. 34.2 Positive tourism impacts

When considering the management of negative impacts to QOL associated with tourism development in the region, the impacts that are least acceptable are those that should receive the most mitigation effort. It is not possible to analyze the “spread” of ordinal data with statistical methodology. Both the impacts that were perceived to have the greatest importance or to have the least acceptability are indicative of greater consensus within the community. This can be used to prioritize management effort further. However, those results with the lowest values, or approaching zero, (a quasi indicator of large spread), may also reveal different opinions held by identifiable stakeholder groups which can then be used to manage and resolve potential conflicts before they start. On the other hand, those impacts ranked lowest may also be indicative of a high number of neutral responses. Before making policy decisions based on results, the raw data must be cross-checked.

Relative scoring indices, used to evaluate the order of importance of impacts to QOL, are a useful tool for managers (tourism operators and/or government regulators) to identify priorities

in management. Within the relative indices of the two preceding figures, it is not possible to assume that a bar double the length of another is twice as important. All that can be assumed is that it is more important based on consolidated community perception. Furthermore, because impacts were presented in random order combining social, economic, and environmental impacts, cross-dimension comparison forces respondents to identify trade-offs.

When considering the importance of positive impacts grouped into the three classic sustainability dimensions (based on average scoring), economic impacts were found on average to be the most important, followed by environmental and finally sociocultural impacts. The two most important economic impacts were (1) “stronger local economy” and (2) “employment – more jobs, better pay.” The overlap between these economic impacts should not be viewed as “double counting” as there are many other factors that can strengthen the local economy. Moreover, the nature of factor analysis methodology negates double counting as an issue (Field 2000).

According to these results, if management of NVI tourism is to follow an ecosystem approach and embrace the idea of using community input to make management decision, these impacts of minor importance/greater acceptability should not be given the same level of priority as the most important/unacceptable impacts.

Factor Analysis

Factor analysis has been used in a variety of studies to reduce information on a large number of tourism impacts down to a smaller and manageable number of indicators (Gursoy and Rutherford 2004; Kibicho 2008; Andereck et al. 2005; Faulkner and Tideswell 1997). Simply put, factor analysis is used here to study patterns of relationship between a variety of dependent variables (tourism impacts to QOL as a result of perception of importance/acceptability), with the goal of finding out something about the independent variables (social, economic, and environmental impact pressures on the tourism system leading to those + and – impacts) despite the fact that independent variables were not measured directly. Factor analysis can be used in two ways: absolute and heuristic. It is not practicable to assess the causal nexus individually for each of the 42 identified impacts (+/–). In this case study, factor analysis was used in a heuristic way, and thus these factors do not necessarily represent all the pressures on complex adaptive tourism systems, but instead those identified appear to be the most important based on community perception.

Factor loadings are a gauge of the substantive importance of a given variable to its factor (Field 2000). In this analysis, factor analysis with a varimax rotation was used for both positive and negative tourism impacts. Positive and negative tourism impact factor analyses converged in eight and ten iterations and explain 61.4% and 70.9% of the total variance in each data set, respectively.

The Kaiser-Meyer-Olkin measure of sampling adequacy (KMO) shows if factor analysis reveals distinct and reliable factors. It ranges between zero and one with values greater than 0.5 being acceptable and values between 0.7 and 0.8 considered to be good. Values of 0.693 and 0.798 were found for factor analysis of positive and negative tourism impacts, respectively. Bartlett’s test of Sphericity confirms that the underlying correlations between the original variables are sufficiently large for factor analysis. These two tests confirm that factor analysis is appropriate for this data. Both factor analyses revealed good KMO values and practically significant relationships between the data (all $p < 0.001$).

Positive Impacts

Overlooking the odd exception within a factor, the descriptive label developed is useful to assess the causal nexus of these impacts based on perception for management purposes. Positive impact factor analysis converged in eight iterations. The impact “First Nations to be self sufficient in a post-treaty world” did not explain enough variance to be significant to any factor and ranked 15 out of the 21 positive impacts in terms of importance. In addition, the impact “More restaurants, bars, hotels and B&Bs” was found to represent variance in both factors two and three. Some impacts within a factor do not fit exactly with the title given to the factor and can be considered as noise in the results that is interpretable.

A total of four significant factors were identified, explaining 61.43% of the variance in the data. The first two factors, which account for 17.08% and 15.58% of the variance, respectively, show differences in their expected common origin. Impacts in the first factor relate to socioeconomic considerations, compared to those in factor two which correspond more with environmental impacts. Factors three and four represent 14.89% and 13.79% of the data and correspond to pressures on the tourism system related to ecosystem services and infrastructure, respectively. There is fairly equal distribution of explained variance between all factors.

In terms of rank of importance, according to the relative importance index average previously described, factor two (environment) is the most important followed by factor one (socioeconomic). The cause of impact perception will be discussed using a modified DPSIR framework leading to recommended management and policy responses.

Negative Impacts

Factor analysis of negative tourism impacts resulted in a total of five significant factors explaining 70.93% of the variance in the data and converged in ten iterations. The impacts “More crime/robberies/vandalism” and “Less feeling of belonging to my community” did not explain enough variance to be significant to any factor and were ranked 4 and 18, respectively, out of 21 negative impacts. In addition, “Littering” is in factors two and three, and “Destruction of sacred and historical sites” is in factors two and five.

The first two factors, which account for 18.65% and 18.19% of the variance, relate to goods and services compared to those in factor two which relate more to the environment based on the somewhat objective factor label descriptions assigned. Factors three, four, and five represent 17.39%, 9.24%, and 7.47% of the data variance and correspond to pressures on the tourism-system-related urban environmental impacts, employment, and culture, respectively. There is fairly equal distribution of explained variance between factors one, two, and three, while factors four and five represent much less of the variance in the data. In terms of rank of importance according to the relative importance index average previously described, factor two (Environment) is the most important followed by factor one (Goods and Services). The cause of impact perception will be discussed using a modified DPSIR framework leading to recommended management and policy responses.

Limitations of the Analyses

A possible criticism of data analyzed here is the small sample size, consisting of 57 individuals out of a community of approximately 10,000, representing a sample population of 0.57%. Thus, for a community of 100,000 a similarly representative sample would be 570 individuals. The results show a strong correlation between the data clustering in factor groups with identifiable

traits that when combined explain a large part of the variance. It is expected that the data is highly interpretable because it was obtained by asking questions appropriate to the concerns of NVI determined using RRA. In addition, the demographics show a wide variety within the sample to represent the overall community. Thus, because this data has been found to be appropriate for factor analysis, is based on community perception, and shows community representativeness, these results can be considered valuable to government and industry.

Statistically significant comparisons between different stakeholder groups were not determined. Therefore, this analysis was unable to determine specific stakeholder groups within the larger community. This would be helpful in proactive conflict resolution between those groups of individuals with diverging perspectives relating to tourism development. Instead, perspectives on tourism development were found to be relatively homogeneous throughout the sample population, and so discussions were limited to the community as a consolidated single unit.

Another limitation is that it was not possible to trace non-respondents and check whether their reasons for non-responding relate to their opinion about tourism in NVI. Furthermore, the study could not reach members of NVIC who went on summer holidays, away from NVI. It is possible that these people might have had different opinions about tourism in NVI.

Tourism Is a Complex Adaptive Social-Ecological System

The falsely optimistic idea that, if managed appropriately, things will ultimately return to a normal and expected state of equilibrium has been the governing principle of most social sciences including economics and tourism (Farrell and Twining-Ward 2005). Tourism management in the past, following a command and control approach with cause-effect rationale that reduces the system to the sum of a few predictable indices (Berkes 2004), should no longer be seen as appropriate, considering new knowledge of the way that systems function (Farrell and Twining-Ward 2005). Instead, tourism involves complex interactions between various driving pressures within the social-ecological system that it operates, as identified here through factor analysis. Complex adaptive systems require adaptive management to consider attributes such as non-linearity, uncertainty, emergence, scale, and self-organization (Berkes 2004).

The components of complex adaptive tourism systems (CATS) can be seen as mini-systems (Farrell and Twining-Ward 2005). The latent indicators identified in factor analysis represent a way of viewing linkages between these mini-systems. According to Farrell and Twining-Ward (2005), "a tourism system is an ecosystem," where tourism is merged with life support systems and related social systems (Farrell and Twining-Ward 2005). Therefore, as an ecosystem, tourism must be recognized as unpredictable and require flexible and adaptive management. Three feedback mechanisms are identified: positive feedback through increasing cyclic flow of energy in growth-oriented tourism development, negative feedback through reduced cyclic flows due to regulations or economic downturn, and structural entropy due to declining energy or investment (Farrell and Twining-Ward 2004). As a result of the recent declines in natural resource extraction industries on NVI and the current global economic crisis, negative feedbacks can be expected to affect the NVI tourism system.

The simple fact that humans and most ecosystems have coevolved and adapted with one another over time allows for the concept of CATS to be rationalized. This simple relationship is a good starting point for conveying information to members of the local community who may be put off by discussions about a "complex adaptive system" due to the complexity of the concept.

Adaptive Management

The concept of adaptive management is central to the Ecosystem Approach being taken here to manage tourism and increase sustainability in coastal tourism development for QOL on NVI. Adaptive management treats management policies as experiments analyzing the responses of the complex system to changes in human behavior (Patterson et al. 2008). Stakeholder input is central to adaptive management and is used to continuously improve all other components in the cycle such that overall planning is in sync with the perception and desires of the community.

Like the concept of sustainable tourism, adaptive management embraces the idea that attempting to maintain an idealized equilibrium state is not possible as it does not exist in the real and dynamic world. Instead, adaptive management uses the concept of social learning to facilitate knowledge sharing between stakeholders in a continual cycle of (1) objectives, (2) indicators, (3) monitoring, (4) results analysis, and (5) review (Farrell and Twining-Ward 2004). The first two of these have been addressed in this analysis for NVIC, and following adaptive management, in order to ensure capacity building and resilience in the tourism industry, a monitoring program is needed next.

DPSIR Framework

The DPSIR (driver, pressure, state, impact, response) framework is an extension of the “pressure-state-response” (PSR) framework which was developed by the Organisation for Economic Cooperation and Development (OECD 1993) and the UN in the early 1990s (Svarstad et al. 2008). Further back, the roots can be traced to the stress-response framework developed by Statistics Canada in the late 1970s (Svarstad et al. 2008). The DPSIR approach was first presented by the European Environmental Agency (EEA 2006) in 1995. It assumes cause-effect relationships between interacting components of the social, economic, and environmental systems (Gasparino et al. 2006).

DPSIR embodies a systems perspective. Its application to the management of complex adaptive tourism systems is both highly relevant and appropriate. Despite this, DPSIR has been underutilized in the past for understanding tourism with the exception of a few interesting examples including planning documents and an MA thesis (Glekas et al. 2006; Noronha et al. 2002; Viljoen 2008). Studies using this approach for tourism are nonexistent in peer-reviewed scientific literature. This approach therefore represents an effort to fill in a gap in tourism management methodology. It embraces the fact that tourism needs a systems approach and uses an established methodology for that purpose. The system viewed in the context of DPSIR does not necessarily have to have scales that coincide for corresponding drivers, impacts, and responses (Svarstad et al. 2008). It is likely that the scale for drivers will be geographically and temporally greater than for pressures and even more so for impacts. Responses that are most effective should address the larger-scale drivers and pressures to be proactive in mitigating negative impacts or enhancing positive ones. If directed only toward impacts, the responses can be expected to be band-aid solution, reactive in nature, and not addressing the root causes.

The DPSIR approach can be used in decision making, by identifying clear steps where the causal chain can be broken by policy action. It represents a systems view to understand how social and economic developments exert pressure on the environment with implications to ecosystems, human health, and societal responses (which in turn feed back through adaptation or corrective

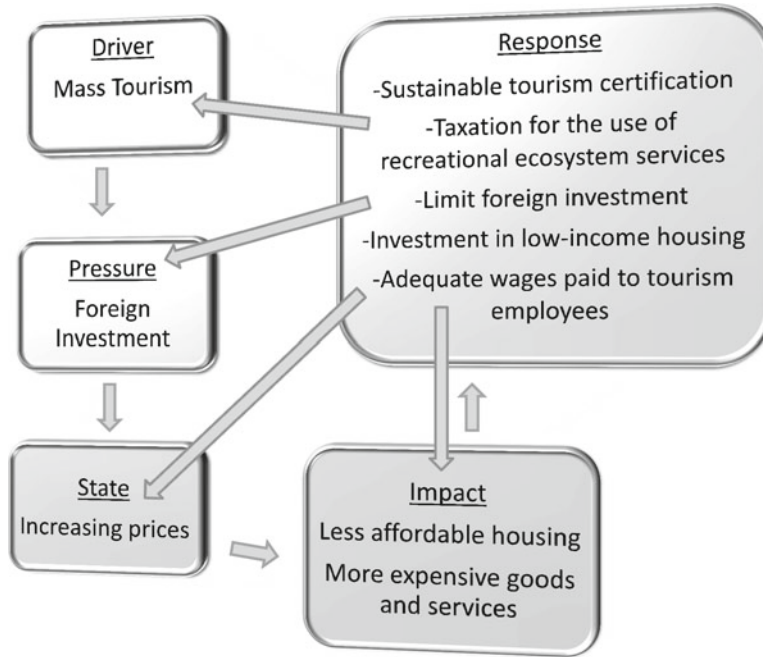


Fig. 34.3 DPSIR for sustainable tourism

action) (Bosch and Gabrielson 2003). Traditionally, “pressure” has been understood only in terms of pressure on the ecosystem and “state” as quantitative descriptors of the ecosystem. However, in the modified approach to DPSIR used here, both “pressure” and “state” will be used to also describe sociocultural and economic dimensions of sustainability. Historically, DPSIR has been used to understand the causal links between sociocultural, economic, and ecosystem components within the overarching context of problems in the natural system. Thus, using this approach within the context of tourism (a social-ecological system) necessitates expansion of the use of “pressure” and “state” variables to include sociocultural and economic dimensions.

Figure 34.3 shows the relations between indicators with responses being directed to all other indicators. A variety of intermediate indicators can be understood in between the DPSIR indicators (represented by the arrows in Fig. 34.3). These intermediate indicators are able to express more than other indicators in terms of the dynamics of interaction in the complex system. Some types of intermediate indicators include eco-efficiency indicators (between D and P) relating to the possibility of economic development without an equivalent increase in pressure on the environment (Bosch and Gabrielson 2003). Technological innovations such as solar and wind power, constructed wetlands for wastewater treatment, and end of pipe treatments are some examples. This is similar to the aforementioned activity-based sustainability in tourism management where limits to tourism development can be reached with certain activities, but when activity type is modified, further development can occur (Saarinen 2006). The link between P and S can be used to analyze time delay (Bosch and Gabrielson 2003) that may occur as a result of foreign investment (pressures) from tourism (driver) leading to measureable increases in real estate and goods and services (state). Dose/response relationships link S to I and can help in choosing the most appropriate state indicator to act as an early warning. Following the previous example, increases

in real estate price (state) can lead to less affordable housing (impact). Economic costs of impacts, as well as other indicators that confirm societal perception of the seriousness of the impacts, are key for triggering societal responses. These responses highlight the link between I and R (Bosch and Gabrielson 2003).

Policy-effectiveness indicators are useful to summarize the relations between the response to change in D, P, S, and I. Policies such as taxation for the use of recreational ecosystem services in an area can be an effective response using natural capital for generating economic capital to ensure the community (social capital) is maintained through the provision of low-cost housing or subsidized goods and services inflated by tourism. Policies that change the driver (tourism) to increase net benefits of tourism can be seen as breaking the causal chain at the root by altering traditional mass tourism practices in favor of sustainable tourism practices. So, how can the information from the previous sections, on community-perception-based pressures of tourism impacts to QOL, be used to develop a plan (1) for a real-world tourism development as a matter of corporate social responsibility or (2) for regional government?

Traditionally, DPSIR has been used to describe negative environmental impacts. This analysis starts with the identification of impacts, both positive and negative, and through factor analysis, it groups impacts into factors representing a common cause of the perception. And, since an impact really only exists if it is perceived to exist, these otherwise latent indicators (factors) can be seen as representing causes of this perception and therefore causes of impacts. In this way, the DPSIR approach, when combined with factor analysis of tourism impact perception, has been extended to provide a new way of looking at interaction in complex social-ecological systems (tourism).

Problems with DPSIR

DPSIR is often used inappropriately due to relating the components in the framework to common words with potentially different meanings. Drivers are exclusively economic activities. Ecologists and natural scientists may be tempted to consider natural drivers, but this is not appropriate. State indicators must be quantifiable, thus discussing the state of the ecosystem as being good or degraded is not appropriate within DPSIR. The extension of state and pressure to include socio-cultural and economic dimensions follows from the discipline of social-ecological systems and the work of Farrell and Twining-Ward (2005) who state that a tourism system is an ecosystem. Thus, in semantic terms, considering an advanced understanding of systems science, in the context of a complex adaptive tourism system, sociocultural and economics dimensions are also ecosystem dimensions. This may seem far-fetched; however, it is absolutely necessary to understand the nature of social-ecological systems (i.e., tourism) to move forward with pragmatic application of the concepts of sustainable tourism development. Svarstad et al. (2008) argue that the DPSIR approach does not generate neutral knowledge, but instead, it reproduces the position of those applying the approach. Criticism is presented on the ability of DPSIR to find a satisfactory way of dealing with multiple attitudes and definitions of issues that are held by stakeholders and the public. The authors recommend future research to explore the incorporation of socioeconomic and cultural drivers to broaden DPSIR. Furthermore, they state that “there is a particular need for elaboration of methodology to address attitudes and definitions of the problem held by stakeholders and the general public” (Svarstad et al. 2008). However, no description is provided for the methodological approach or tools that need to be elaborated. This requires ingenuity, as proposed in the analysis of this case study. The DPSIR approach to complex adaptive tourism systems (Tables 34.2 and 34.3) originates from perceptions of NVIC as it relates to coastal tourism. Attempting to use the DPSIR approach on all 42 impacts to QOL would be an exhaustive

process that would ultimately be so disorganized that it would be rendered useless compared to looking at four or five common factors.

Synthesis of DPSIR Framework and Factor Analysis

Sustainability indicator development in the context of tourism needs to follow a comprehensive systemic approach that recognizes the interrelations between indicators (Schianetz and Kavanagh 2008). There is a causal connection between perceived QOL impacts that are grouped together in factor analysis. DPSIR seeks to explain causal connections hierarchically and to develop holistic and proactive responses. As described above, impacts are clustered based on latent commonality in perception, which determines the nature of existence of an impact. Thus, factors indicate causes of impacts or pressures within DPSIR.

A different approach to the use of the DPSIR framework is proposed. In the past, DPSIR has followed an approach like steps one through six below:

1. Look at the quantifiable state indicators of the system.
2. Determine acceptability of change based on thresholds.
3. When thresholds are exceeded, label these as impacts (thus only seeing negative impacts).
4. Determine what the pressures are.
5. Determine the driving forces of the pressures.
6. Determine responses to D, P, S, and I to try and maintain the artificially constructed static equilibrium that may never have actually existed.

Instead, and more simply, the approach used here is to ask those impacted what the impacts are, and then to ask them if they are important and/or acceptable. The common origin of these perceptions can be seen through DPSIR as a common pressure on the system from the driver in question (tourism). This is the pursuit of the causal nexus.

The DPSIR framework is used here to identify commonalities in management of factors. It is used to determine where breaks in the causal chain can be identified to target responses for minimizing negative impacts and maximizing positive impacts to QOL. The integration of factor analysis with the DPSIR framework provides a systemic way of working through the causal chain of problems to develop effective and integrative management plans. The use of this approach is surprisingly limited (Gasparino et al. 2006; Schoder 2005) especially in the context of coastal tourism and QOL. Combining these tools represents a novel approach to the management of complex adaptive tourism systems. According to Schoder (2005), data and facts must be linked through propositions that confer meaning because (1) the aim of science is theory, (2) data alone is meaningless, (3) factor analysis is useful for defining factors that are seen as the causes of the patterns they represent, and (4) the regularities determined are indicative of a causal nexus. For example, “just as the pattern of alignment of steel filings near a magnet can be described by the concept of magnetism, so the concept of magnetism can be turned around and be said to cause the alignment. Likewise, an economic development pattern delineated by factor analysis can be called a cause” (Schoder 2005).

Noronha et al. (2002) use DPSIR in the context of Coastal Tourism and found (1) pressures on different domains including natural environmental resources, the built environment, and hospitality and cultural resources, and (2) considerable environmental, sociocultural, and economic impacts. Industries (including but not limited to tourism-based), communities, and governments have been found to see differences when looking at the key driving factors they expect to impact tourism in the future (Noronha et al. 2002). In each factor, the clustered original indicators (impacts) are those that are most closely associated and have the same underlying causes of per-

ception. However, caution must be exercised in the interpretation of multivariate indicators such as factor analysis, especially in terms of cause and effect relationships (Kirby et al. 2005). Thus, by using a recognized methodological approach (DPSIR), interpretation can be followed through the causal chain transparently.

Through the use of adaptive management principles, the understanding of pressures of certain groups of impacts can be redefined in the cycle of continuous improvement. The results below use the DPSIR framework to understand the management of the perceived tourism impacts. The identified pressures and responses should not be viewed as answers that are complete but are meant to elucidate a methodological approach to managing complex adaptive tourism systems and maintaining QOL. They should be considered as a starting point that should be improved through further consultation with NVIC residents, government, and tourism operators, using the adaptive management cycle.

With the assumption that current practices in mass tourism can be seen as the driver of the majority of impacts perceived by residents and government of NVIC as well as impacts as discussed in literature, we can look to sustainable tourism theory to provide responses to alleviate these impacts. So, through the use of concepts such as protection of recreational and cultural ecosystem services, and community perception integration in decision making, as discussed in the principles of sustainable tourism, responses to these impacts can be predicted, applied, monitored, and adapted to improve conditions toward sustainability and QOL. The following table will identify the concepts of sustainable tourism that can be applied as responses to each of the determined common pressures of tourism impacting the sociocultural, economic, and environmental states of NVIC with the hopes of improving these states by maximizing positive and minimizing the negative impacts. The DPSIR tables showing positive and negative impacts will be presented in different ways. Negative impacts (Table 34.2) will be assumed to have mass tourism as a driver and sustainable tourism concepts as response, whereas positive impacts (Table 34.3) will be assumed to be able to be driven by sustainable tourism, components of which will be highlighted as responses to ensure their provision.

Tables 34.2 and 34.3 show the utility in organizing impacts to QOL using factor analysis in combination with DPSIR to provide responses to mitigate negative impacts and accelerate positive ones according to common origins. However, the information within these tables should not be seen as complete. Instead, it represents a brainstorming exercise following this newly developed approach. Following the concepts of the Ecosystem Approach and the inherent requirement for adaptive management, the information above should be tested and improved over time with the inclusion of local community perception and engaging other stakeholders.

Recommendations

This chapter identifies a series of recommendations tailored to be achievable and appropriate for those groups within a tourism system with the ability to advance tourism development while improving QOL. Recommendations have been provided in the DPSIR tables, within the response column, and below additional recommendations have been directed toward academia, government, and tourism operators.

Table 34.2 DPSIR – negative tourism impacts

Driver	Pressure	State	Impacts	Response
Mass tourism	Foreign investment Peripherality	Rate of property value change Change in price of goods and services Migration demographics	Factor 1 – Goods and services Less affordable housing Unfair increase in home prices and property tax	Taxation and distribution to promote equity Subsidies for low income housing and essential goods and services Limit foreign investment
			Benefits to only a small % of community Unfair increases in rent More expensive – food, clothing, and services	
	Tourism comprised of SMEs lacking coordination Lack of training and certification by tourism operators	# km ² Protected areas Ratio developed: pristine lands # habituated / problem wildlife destroyed	Factor 2 – Environmental Damage nature from tourism Water pollution and use too much of water Disrupt wildlife Large stores put local businesses out of business	Limited numbers of tourists Appropriate signs Tourism operator guidelines and certification Community based ecosystem monitoring*
			Destruction of sacred and historical sites Littering	
		[]'s of air quality parameters Traffic accidents/annum Alcohol sales Drug related arrests Noise Casino development % Employment assistance in off-season % Dependence on tourism	Factor 3 – Urban environment Air pollution More traffic accidents More drugs, alcohol and prostitution Noise pollution More gambling Littering	Technological innovation Monitoring Legislation Education
	Global economic factors		Factor 4 – Employment Seasonal income Tourism jobs replace traditional forms of employment	Marketing Include traditional craft in cultural tourism Tourism diversification - storm watching Employment training
		% First Nations speaking Kwakiutl Number of sacred and historical sites	Factor 5 – Culture Destruction of sacred and historical sites Loss of culture and traditions	Historic Fort Rupert Community Project Catalogue cultural capital
	Lack of cultural sensitivity and understanding			

*-. Reference: Yarnell and Gayton 2003

Table 34.3 DPSIR – positive tourism impacts

Driver	Pressure	State	Impact	Response
Sustainable tourism	High hopes that tourism can offset declines in fishing, logging and mining	Unemployment rate Average NVIC Income Local business Success rate Youth outmigration	Factor 1 – Socio-economic More money for whole community More profits for local businesses Employment—more jobs, better pay Give youth hope for future opportunities Stronger local economy More entertainment and recreation options More restaurants, bars, hotels and B&B's	Collective Marketing Community fund for training / scholarships Tourism management partnership / cooperative**
	Community connection to nature (due to remote/peripheral nature of community)	# km ² Protected areas	Factor 2 – Environmental protection Better quality-of-life Protect wildlife Care for environment and make area look better Less damage to environment than logging, mining and commercial fishing Create parks and protected areas	Community based ecosystem monitoring* Tourism Operator guidelines and certification Designated protected areas Land use planning Certification
	Protection of local environment and cultural heritage	\$ Eamed for protected area creation/management % Economy based on cultural and recreational ecosystem services High school and college graduation %	Factor 3 – Safeguard cultural ecosystem services Protection and preservation of traditional knowledge about nature Better understanding of different cultures and communities Education and increased environmental awareness Generate money to manage protected areas	Educational programs Training locals Tourism Operator Certification** Certification
	Provide benefits to local community	Municipal tax revenue # New roads % Public transport spatial coverage Timing of public transport # New restaurant, bars, hotels and B&B's per annum	Factor 4 – Infrastructure Better public transport (buses) Better services (water, gas, electricity, internet, phone, etc.) Better protection from Police and Fire-fighters Better roads and community facilities (community centre, traffic lights) More restaurants, bars, hotels and B&B's	User fees from nature-based tourism

* - Reference: Reimers 2002

* - Reference: Yarnell and Gayton 2003

** Reference: North Island College 2011

Future Academic Research

Future academic research should focus on further development of the use of the structured management system used here to pursue the causal nexus by combining DPSIR with factor analysis. Academic research, although often theoretical in nature, has an important role in continuously improving the understanding of the driving forces and pressures within complex and adaptive tourism systems.

Cataloging types of activities operating within a given geography would be useful in assessing potential impacts, and GIS use would provide enhanced understanding. To address the issue of tourism seasonality, a seasonal calendar of significant natural and cultural events should be completed and marketed accordingly (e.g., the FILOMI days, First Nations traditions, running and spawning of different species of salmon, blooming of certain flowers, summer and winter solstice, migration of whales, and others).

Government Policy Development

A variety of QOL impacts from tourism have been identified through this investigation. This information should be used by regulators at various levels of government in combination with adaptive management to generate new and evolving knowledge of tourism systems at a regional scale. Perception of the impacts and the activities should be used by government to establish policies and guidelines for net benefits. Furthermore, to preserve the peripheral nature of NVI tourism (a tourist attraction), future growth must have limits imposed and future development must be well planned.

Engaging local First Nations in tourism using the cultural and recreational ecosystem services on NVI has the potential to cause both negative impacts and benefits to QOL. It is hoped that mitigation and promotion measures can lead to net benefits. It is recommended that First Nations tourism be developed through a partnership between stakeholders including: First Nations, the Regional District of Mount Waddington, local tourism operators, the Wilamola Project, North Vancouver Island Aboriginal Training Society, and the North Island College. The partnership should be administered by the Regional District of Mount Waddington.

Active participation with NVIC and joint decision making by key representative stakeholders should be part of future planning; this may be essential in the strategic planning process to yield useful results (Jamal and Getz 1995). Active participation with NVIC should be the next step formulated around the ideas elucidated through this investigation. In addition, Ko (2005) recommends the inclusion of tourism service quality considerations (the demand side) into the sustainability assessment process. This analysis has overlooked desire by tourists for the first stage of sustainability assessment but recognizes this as important for integration with the results provided here.

Tourism Operators

In 1999, 13 tourist operators on Vancouver Island came together to develop joint economic security through the formation of the Vancouver Island Adventures Co-operative. This group expanded throughout BC and is now called Adventures BC Travel Cooperative. The purpose of the group is to share marketing services and create tourism packages using various services of the membership (Wylie 2001). Small, often family run, businesses providing ecotourism usually work with

limited financial resources and can be overloaded with marketing, planning, and administration. Marketing issues in tourism are prevalent because this industry sector is characterized by thousands of small operators, many of whom need product development support. Ecotourism and adventure travel have been identified as priorities for the product development by the Canadian Tourism Commission (CTC 2001).

Adventures BC Travel Cooperative has been established to alleviate some of this pressure so that operators can devote more time to development of new markets and products (Wylie 2001). There is great potential for the establishment of adaptive co-management with the BC Provincial government to assess sustainability while continuously improving QOL and advocating best management practices in tourism along the BC coast. Co-management theory advocates that the responsibly for allocation and use of resources be shared among multiple parties to enhance efficiency of decision making, and provide more broad-based reasons for action with an emphasis on community engagement (Plummer and Armitage 2007). By increasing capacity at local scales, enhanced equity can also be achieved. Adaptive co-management considers nature as an evolutionary and self-organizing process at a hierarchy of scales, where the higher-level broad scales provide rules and incentives to the smaller scales, making the social-ecological systems more robust to change (Plummer and Armitage 2007).

Northern Vancouver Island Community

The community (including First Nations) has an important role to play in the future of sustainable tourism development. They need to be willing to engage with researchers from academia through processes like the one used in this analysis. In order to ensure that net QOL benefits to the community are achieved, the community should take an active role in tourism planning. As shown here, 89% strongly agree or agree that “community members should be involved in tourism planning.”

Conclusion

Sustainable tourism is an evolving concept, a path toward travel and leisure that respects local communities and their values as well as minimizes impacts to the natural environment. Tourism industries have great potential to use the natural and cultural ecosystem services of Northern Vancouver Island and in doing so can be expected to influence QOL and interact with the local sociocultural, economic, and environmental components of this complex and adaptive social-ecological system. These interactions may be perceived as negative impacts or positive impacts, and this perception will change with the tourist system and other subsystems as they evolve. By pursuing the causal nexus, and adapting management as latent complexities are understood through research into tourism systems, responses that are proactive, long term, and region specific can be developed to maintain QOL.

The most important tourism benefits to QOL were found to be protection of wildlife, future opportunities for youth, and area aesthetics. The most unacceptable negative impacts were found to be an increase in drugs, alcohol and prostitution, littering, and destruction of sacred and historical sites. Overwhelmingly, the Northern Vancouver Island Community was found to support increased tourism and believe that tourism is good for the community (94% for both) but feel that tourism operators need to be certified to ensure that they do not damage the local culture and environment (93%).

In this analysis, a novel approach to tourism management has been proposed using heuristic factor analysis in combination with a modified approach to the DPSIR framework. The approach was tested using NVIC perception of coastal tourism impacts to QOL, indicating that the methodology is useful for (a) reducing a large number of variables to a smaller number linked by origin and (b) describing the origin of the factors in terms of causality using DPSIR to understand where responses can be directed to enhance positive impacts and mitigate negative impacts to QOL. This approach elucidates linkages in the complex system, allowing sustainable development to be planned based on an understanding of the causal nexus in terms of perceived social, economic, and environmental impacts. The factors discovered show overlap between impacts and in doing so challenge the convention of viewing sustainability in terms of these dimensions that have historically been viewed independent from one another. Although the context here is coastal tourism, adaptation of the methodology may be useful for other sectors with close social-ecological interaction and where integrated assessment is required for sustainability and QOL assessment.

NVI has extensive, pristine, and ruggedly beautiful coastline. It is a dream location for outdoor adventure and nature-based tourism. The virgin wilderness is home to a great wealth of biological diversity and ecosystem services (both cultural and recreational) that provide extensive opportunities for tourism development. However, the development must be sustainable so as to avoid undermining the natural base, local economy, and the QOL of communities in the region that tourism depends upon. Management of complex social-ecological systems for sustainable coastal tourism development requires an understanding of community perception and the causal nexus of tourism impacts on quality-of-life.

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Chapter 35

Rural Tourism and Second Home Development: The Case of Colorado

Patrick Long, Mick Ireland, Derek Alderman, and Huili Hao

Introduction

Tourism development in rural communities and rural areas in the USA has been the goal for many decades now of local community leaders, state and federal agencies, nongovernmental organizations, and politicians at all levels, with a mixture of success and failure. Such rural development has often been focused on nature-based, historic, cultural, agricultural, and special event themes. The successes seem to have emerged due to the efforts of an effective local leader or group, the discovery of an asset(s) timely to the trends of the traveling public, the migration to rural living in environments accessible to urban employment, and personal wealth that has allowed for the development of second home economies in amenity-rich locations. The failures appear likely due to the rejection by local residents of such development, lack of capitalization and infrastructure, product life cycle burnout, changing marketplace preferences, and economic conditions that limit visitation and expenditures. Any optimism for support of such development that may have emerged from national level actions such as Congress's authorization of the National Rural Tourism Foundation and the establishment of the National Multicultural Tourism and National Rural Tourism Initiatives could not be sustained after the demise of the US Travel and Tourism Administration.

One area of rural tourism development that has experienced substantial, and, for the most part, sustained growth (despite a recent slowdown in an economy that has affected everything), has been second home development. Such development appears to be motivated by the desire to

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financially invest in rental property or to be able to spend one's leisure time in an amenity-rich location, much of this being spurred by the personal wealth of the "Baby-Boomer" generation.

Places of natural beauty throughout the USA frequently become highly desirable places to live, vacation, and own a second home. Often, the impacts of tourism and second home development, both positive and negative, dominate decisions regarding the destination's economy, environment, and community culture. Elected officials, public managers, developers, and residents in such tourist-based communities are typically seeking information to understand, estimate, and manage the changes they are facing and thus contribute to the long-term sustainability of their communities.

But, the most important question to such emerging rural second home destinations is "Can we sustain the character and qualities that brought most residents to these communities without attracting so many that we choke on our own success?" (Ireland and Long 2007, p. 1) Wealth, the large number of baby boomers, and a favorable tax code on real estate purchases have all contributed to change that affects housing, local workforce, and the demographics of these communities; these factors in turn affect the quality of community life. Various tools for dealing with the consequences of this economic influence have been proposed and implemented including land use controls, restrictions on development, real estate transfer taxes, affordable housing policies, open space acquisition, and public transportation systems. The premise of this chapter is that understanding the underlying causes of demand for resort real estate in rural areas is the most important analytical tool in trying to reconcile economic prosperity with other community values.

Background

In many rural mountain resort communities, there is growing realization among residents that the changes they are experiencing are much greater than their ability to plan for and manage such change. Rapid growth is diminishing small town values and local heritage; housing is becoming expensive and scarce, forcing some residents to leave the community and workers to drive great distances; development is disrupting open ranchlands and natural resources; improvements in infrastructure including transportation, sanitary sewer, and parking lags sharply behind population and visitation growth; existing land development regulations are inadequate, and local residents are expressing the need for a better system for managing these changes. Of particular concern is how to manage an economy that is becoming more driven by second home construction and services than traditional short-term tourism visitation, of how to provide affordable workforce housing in an environment with escalating real estate prices, and how to recruit workers to fill jobs traditionally low-paying and unappealing in places with sometimes limited tolerance for accommodating an immigrant workforce.

One does not have to imagine very hard to foresee communities which are filled with second homes whose owners are expecting services that there are no workers to deliver; or destinations where every piece of available land is filled with second homes priced out of the financial range of workers including teachers, public safety workers, and the middle class in general; or a destination where the workers are no longer willing to travel the distance from where they can afford to live to their place of work; or destinations where the social disorder is so great between the affluent guests and the working poor that visual conflict becomes common; or destinations where the air quality is so poor due to transportation emissions that the natural beauty of the region is impaired and personal health is affected.

A number of factors (see Fig. 35.1), consistent across most amenity-rich rural communities and important to how residents and visitors determine sense of place, affect what such places are

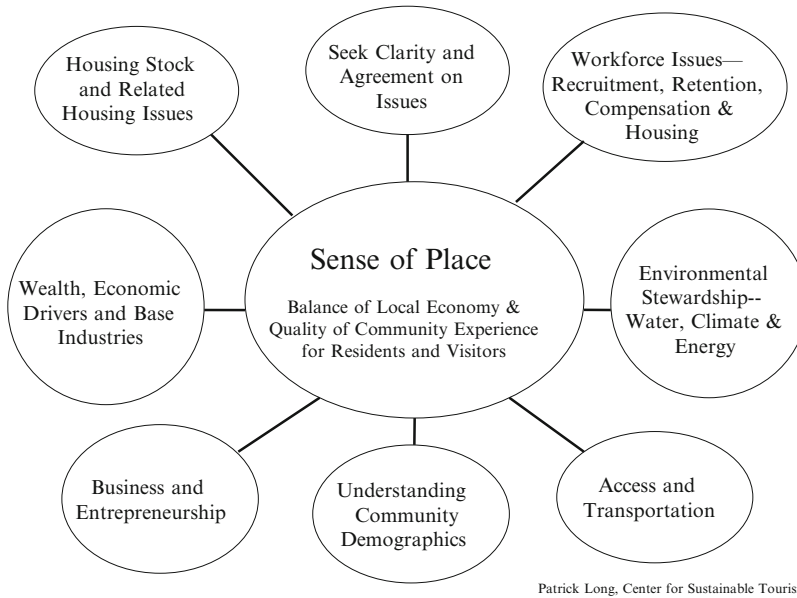


Fig. 35.1 Factors influencing sense of place

becoming today. These same factors likely influence over time the quality of community experience that second home–based communities can provide for both residents and visitors. Included among these factors are (1) the influence of wealth and the understanding of a community’s economic drivers and base industries; (2) the region’s demographic characteristics and trends; (3) the availability and affordability of local housing stock; (4) the ability to recruit, compensate, house, and retain a workforce; (5) access to and from and consequently, throughout the community and immediate region; (6) the extent to which business and entrepreneurial behaviors are encouraged and can afford to serve the needs of the community and their workforce; (7) the degree of environmental stewardship the community embraces regarding water, climate, energy, and land use; and (8) the ability of residents to clarify and seek agreement on community issues and solutions.

Sense of Place

At the core of the discussion of sense of place in second-home driven rural communities are the changes that amenity-rich regions are experiencing and how residents and visitors assess their experience as these communities undergo change. Due to location, many rural resort communities are referred to as “gateway” communities. McMahon and Selzer (2004) describe such communities as “. . . a close neighbor to a large national park that draws tens of thousands of tourists each year” (p. 5). They note that such communities “. . . are important not just for their growing role in providing food, lodging, transportation and other business support for visitors but also as portals to cherished landscapes . . .” (p. 6). But Stokowski (2002) cautions that “research focusing primarily on the physical qualities of actual recreation, leisure and tourism places is limiting, and researchers must look to the role of language and discourse to develop richer understandings about the social construction of place and its political ramifications” (p. 379). Behr (1989) combines these two perspectives when he expresses his concern about rural places ceasing to exist,

when he first discovers the explosion of second home development in his region, and when he realizes that no place within a few hours' drive from metropolitan areas is safe from the pressures of vacation home development and visitation.

Farnum et al. (2005) write about the evolution of the thinking about sense of place in natural, resource-based destinations, and how this concept affects an individual's decision on where to recreate and the extent to which one will ultimately become involved in the area amid the changes taking place. The authors feel that sense of place is an encompassing term referring to a group of cognitions and affective sentiments held regarding a particular geographic locale and the meaning one attributes to that place. Some of the more commonly employed terms representing these cognitions and sentiments include place meaning, place attachment, place identity, place dependence, and place satisfaction.

Place meaning refers to the dimensions of sense of place that are more cognitive than emotion-based and encompass both symbolic and evaluative beliefs. Place meanings can differ and change over time independent of place attachment. Place attachment entails an emotional component about a place and is assumed to be generally positive. Kyle et al. (2003) writes about *place attachment* in reference to the extent to which an individual values or identifies with a particular environmental setting. Attachment to place may be based on social relationships or processes more than particular landscape characteristics so that even if the landscape changes, the attachment may not (Beckley 2003).

Place identity and place dependence are the two components that make up place attachment. *Place identity* refers to how one views oneself in relation to the environment and how humans use place to construct and maintain self-identity (Proshansky et al. 1983; Smaldone 2002). *Place dependence* refers to connections based specifically on activities that take place in an outdoor, recreational setting. Such place dependence develops out of the fit between one's intended use of an area and the area's ability to adequately provide that use, especially relative to alternative sites (Gibbons and Ruddell 1995). *Place satisfaction* represents a general judgment of the quality of settings and is an important concept to integrate into sense of place. This is because people with a strong place attachment but low place satisfaction are most likely to say they would act to protect a place, whereas high satisfaction accompanied by high attachment does not predict intention to act (Stedman 2006).

For the purposes of this chapter, sense of place is generally viewed as the perception of public policy makers, representatives of development companies and small businesses, nongovernmental organization leaders, and community residents, of the vitality of the local economy as well as the quality of the community living experience. When viewed in the context of the factors that are influencing change to these amenity-rich second-home and gateway communities, vigilant monitoring and action must be maintained in order to sustain the qualities that have made these communities desirable places to live and work. A most insightful statement by McMahon and Selzer (2004) regarding the future of second-home and gateway communities is that "No matter where your community is located, there are two things to keep in mind. First, special places do not remain that way by accident, and second, whether fast or slow, change will occur" (p. 1). Places are not fixed or set entities but open to constant social reconstruction. Ireland and Long (2007) in turn noted this challenge "How can we sustain the character and qualities that originally brought most residents to these communities and which have made these communities attractive to short term visitors and second home owners?" (p. 2).

Ireland's emphasis on the challenge of sustaining the special quality and character of communities brings us to consider another important component of sense of place – a sense of responsibility and commitment, a willingness to protect the place from exploitation and detrimental change (Relph 1976). Sense of place has been found to be positively correlated with pro-environmental intentions among people (Walker and Chapman 2003). Research suggests that sustainable tourism requires linking a sense of place to a sense of care to facilitate community

awareness of the development challenges that threaten the character of places (Walker 2008). Emotion connections to place “can make a critical contribution to effective community development and planning efforts, as they are a source of community power and collective action” (Manzo and Perkins 2006, p. 337).

While place attachment can inspire collective action, it would be wrong to see it as monolithic in nature. As Johnson and her colleagues (2009, p. 2) observed, “understanding sense of place can be a daunting task due to the need to document the range of views within a given community... there can be multiple interpretations of place at a point in time and across time.” There are multiple and potentially contradictory interpretations of place because people have different social and economic positions and interests within communities. For instance, second home owners and fulltime residents may have potentially conflicting views on the character and meaning of their rural communities because of differences in wealth and the history and condition of residence.

Stedman (2006) has warned against the popular tendency to see second home owners as simply outsiders within amenity-rich communities. He found higher levels of place attachment among second home owners than permanent residents. There is also evidence of second home owners actively seeking to protect the amenity value of an area, leading them to both cooperate and disagree with different local groups (Mottiar and Quinn 2003). Any effort to address quality-of-life in amenity-rich rural areas requires understanding where the place-based needs, attachments, and experiences of second home owners and full-time residents converge and diverge and then trying to identify a common ground.

The Literature

The phenomenon of second homes, their development and impacts, has been reported from a historical context across many countries including Denmark (Tress 2002), South Africa (Vissar 2003), Hungary (Dingsdale 1986), Norway (Hecodk 1993), the UK (Gallent and Tewdwr-Jones 2001), and the USA (Godbey and Bevins 1987; Stynes 2003; Stedman 2006). Such studies have focused on defining and describing second homes, second home use patterns, economic impacts, conversion of second homes to full-time residences, local tax implications, place attachment, and inflation of local housing costs. Less coverage has been given to understanding the second home economy as an economic driver, the economic implications of the construction phase of second home development, to what extent second home owners and local residents share common recreational interests and similar lifestyle values, understanding the long-term implications of second homes on generating the need for services for workers and their families, and the implications of the conversion of second homes to permanent residences on the level and type of local services. Additionally, none of the previously mentioned studies addressed the implications of “super-sized” second homes and the impacts of extreme wealth on a second home destination.

In the USA, the growth in second home development has been driven by the desire to have a place to enjoy leisure time as well as for real estate investment with appreciation potential (Francese 2003b, p. 40). As has been observed, the construction, marketing, financing, and maintenance of second homes all create significant economic impacts. Additionally, second home owners pay property taxes as well as maintenance, utility, security, and insurance costs. This spending exceeded \$19 billion a year on the more than 6 million second homes in the USA in 2003 (Francese 2003a, b, p. 40) with the growth rate of second homes hovering around 5% annually.

The general portrait of a second home owner in the USA is one of being middle-aged or older with an annual income of more than \$80,000 and having earned a college degree. Twenty-four percent of second home owners are retired, and they typically spend far above average on hiring

someone to care for their properties. “People with two homes spend, on average, five times as much as those with one home on, among other things, lawn care, home security, pest control and housecleaning” (Francese 2003b, p. 42).

It is projected that the “baby boomers” will be the primary future market for second homes in the USA due to their available discretionary income, their efforts to delay the aging process and continue to earn and spend, and their sheer numbers (Francese 2003a). As reported in Francese (2003a), the first baby boomers turned 55 in 2001 with the 55–64-year-old age group filling over the next decade with 38 million Boomers (p. 49).

In many amenity-rich rural communities, a large percentage of the housing stock is purchased by tourists as second homes. This demand for second homes affects both the character and price of housing. First, particularly in major rural resort destinations, second homes tend to be large, amenity-rich developments that are much more expensive than the traditional local housing stock (Hall and Müller 2004a, b). Second, due to the common scarcity of developable land in rural resort communities, the available housing stock is limited. Second home demand adds to that scarcity, thereby further increasing prices (Cho et al. 2003). Because of these prices, second home demand can lead to a process of gentrification, wherein lower-income full-time residents are unable to purchase homes in the resort community leading to a process of “class colonization” (Phillips 1993).

Hettinger (2005) proposed a theoretical model of housing market intervention that, when applied to tourism markets, suggests that “when externalities exist in the housing market, supply and demand become unbalanced, leading to market failure in the form of unaffordable housing costs and displaced local workers” (p. 105). He identified three primary types of externalities, those being “(1) topographical constraints; (2) growth-management, land-use, and zoning regulations, which primarily alter the supply side of the equation; and (3) second-home demand, which alters the demand side of the equation. If these externalities exist in a tourism community, then conditions exist for market failure, and high housing costs and displaced workers can be expected” (p. 105).

The Colorado Case

A substantial body of research exists examining the distribution of second homes, ownership trends, and impacts of second home development (most notably, Coppock 1977a; Hall and Müller 2004b). While this existing research provides an excellent general description of the second home phenomena and its impacts, much of it is not directly applicable to the high-end, luxury second home industry that characterizes such destinations as Colorado’s ski resort communities (Perdue 2003a, b).

Three primary limitations exist in applying the existing second home research to such communities. First, as with most products, great variance exists within the concept of second homes, ranging from small cabins in remote settings to elaborate trophy homes in gated resort communities (Curry 2003; Egan 2000). The existing research has not segmented the second home market and examined differences by product type. Rather, the predominant focus has been on describing the “average” second home, the “average” second home owner, and overall trends in the marketplace (e.g., Timothy 2003).

Second, due to the availability of data, much of the second home research has been conducted in Canada and Europe, particularly the Great Britain and Scandinavian countries (see for example, the papers in either Coppock (1977a) or Hall and Müller (2004a)). While this research is clearly important and insightful, differences in land ownership and real property tax laws limit its applicability to Colorado resort communities.

Third, as with much of the existing second home research, this case was motivated by the need for information to guide government policy concerning second home development (Gill 2000;

Gill and Williams 1994). The existing research clearly indicates that second home development potentially has substantial economic and social impacts on local communities (Müller et al. 2004) and that those impacts vary by community (Coppock 1977b). It is essential to examine the unique characteristics of Colorado ski resort communities and to understand the implications of those unique characteristics to both second home development and the associated policies.

Understanding the Full Implications of High-End Second Home Development

Relatively few resort communities have systematically analyzed the profound demographic changes in their communities. Although most elected officials and public policy makers have a clear intuitive sense that their community’s population is changing in ways that are creating public policy problems, most are surprised to see how thoroughly their younger and middle-class populations have been declining over the past few decades. For example, this chart (Chart 1) shows changes in Aspen’s age demographics for 1990–2000. The depiction of age distribution is fairly typical of the results of similar analysis in Vail, Breckenridge, and Steamboat Springs, Colorado. During the 1990s, Aspen experienced about a 1.7% population growth per year with most of that growth coming from annexation. The above table shows absolute losses for virtually every adult population group under 45.¹ Although the pattern varies somewhat among the various resort communities included in this analysis, the results typically show a “lost generation” between the ages of 20 and 45 with slower than average growth for those groups but explosive growth in the 45 and older categories.

Vail’s pattern was very similar to that of Aspen (Chart 2). Similar complaints are often heard in these two competing resorts although Vail has not had as vigorous of an affordable housing effort.

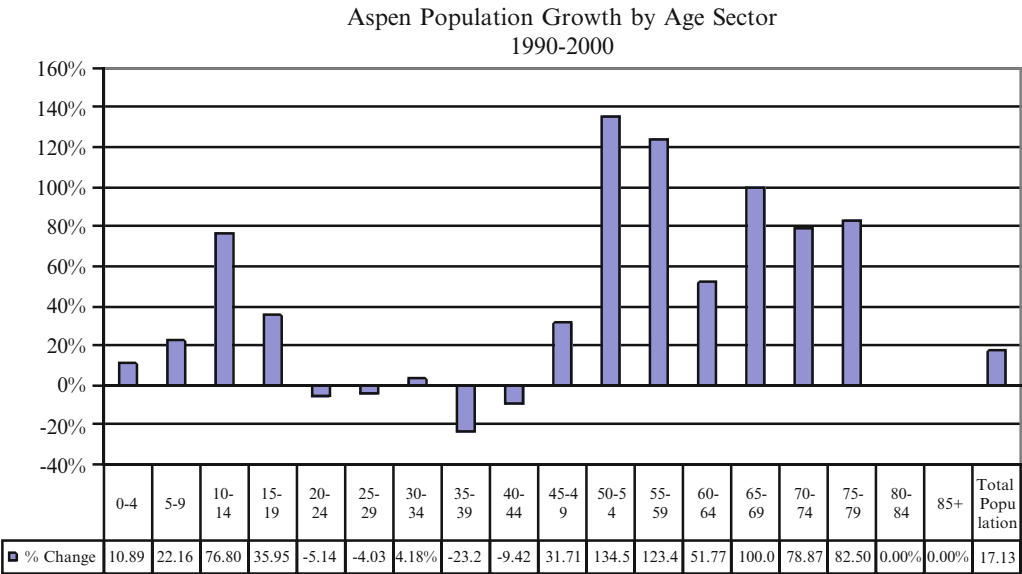


Chart 1

¹ Aspen’s population increased in the 1990s by 17% from 5,049 to 5,914. However, census block data available for those years shows that only about 400 persons were added to the area included within the city’s 1990 boundaries.

Both are extremely expensive resorts with median free-market housing prices at or above \$2 million and each is home to the wealthiest of US families, median income for second home owners in both communities having been measured in excess of \$350,000 per year.²

Vail Population Growth by Age Sector
1990-2000

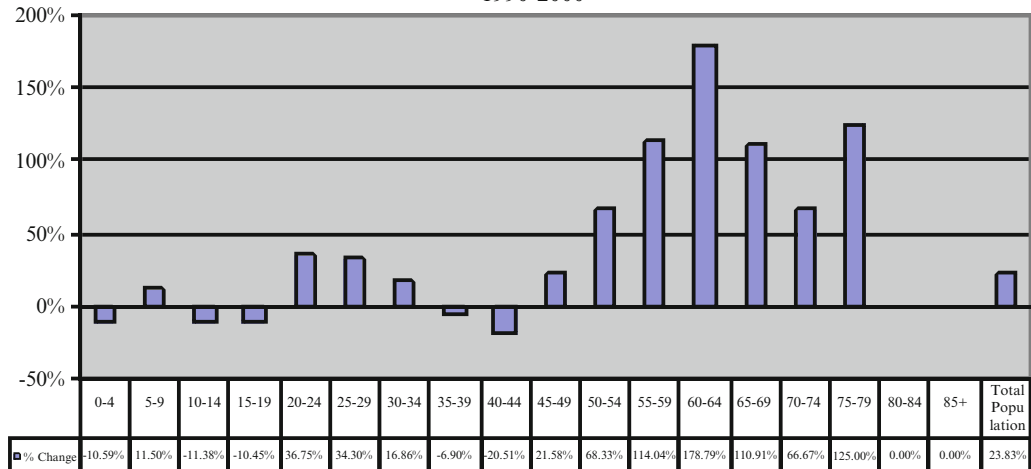


Chart 2

Steamboat Springs shows a similar pattern but without the dramatic “lost generation” valley between 20 and 45 (Chart 3). However, Steamboat still shows a loss for the 30–34 age group and also shows another characteristic seen in resort communities that being low or declining numbers of new births as well as explosive growth in the 50–60 age group.³ Aspen’s median age increased by almost 6 years during the 1990s and Steamboat’s increased by about 3 years during that same period.

Steamboat 1990 - 2000

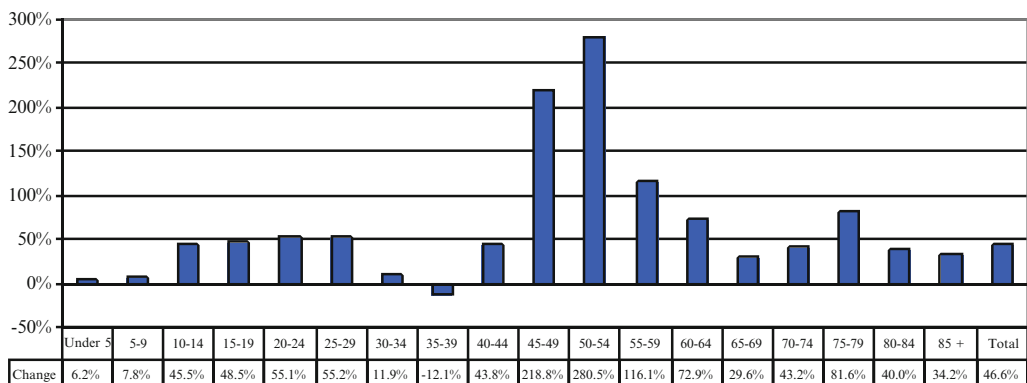


Chart 3

²The census doesn’t do a very good job measuring extreme wealth. The top category in the 2000 census was “\$250,000 and above,” somewhat akin to lumping all NBA players above 6’6” as “very tall.”

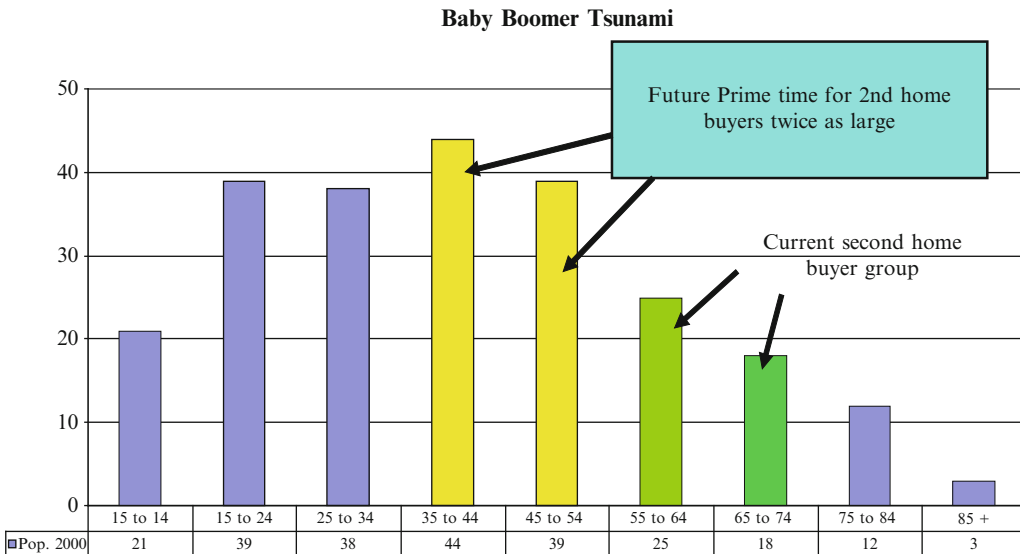
³Although Aspen’s strict land use controls are often blamed (and surely contribute) to the demographic changes in that community, it is very apparent that these controls are not the driving force of these changes as so many resorts with few restrictions are experiencing similar changes. For instance, Steamboat’s 50–54 population more than doubled, and its 55–59 age group almost tripled during this time period, illustrating the demand side component of the changes.

Affluence, Job Growth, and Commuter Patterns

The new resident immigrants and second home owners are typically very affluent. Although census data does not measure this very precisely, Pitkin County and the Northwest Colorado Council of Governments⁴ have conducted several studies that measure the impact of this affluence on job growth and commuter patterns.

In Pitkin County, for example, where Aspen is located, Clarion and Associates concluded that the percentage of the local workforce housed within the county had fallen from about 73% in 1985 to about 44% in 2004, meaning that the county was increasingly reliant on imported labor for its workforce with consequent increases in traffic and commuting. The exodus of the younger residents combined with the affluence of their successors and second home owners meant that jobs were growing while the available population to serve them was falling. Additionally, by 1993, the average daily traffic over the two-lane bridge at the west end of Aspen approached 23,000 vehicle trips per day, and controversial traffic demand measures (TDM) were implemented to limit this growth in traffic.

Clarion and Associates also measured jobs generated by second homes finding that second homes created about 5,000 jobs, approximately one-third of the county workforce, and that job creation rose in a steep exponential curve with house size.⁵ Taken together, the change in demographics seems to account for the seemingly paradoxical complaint that resorts are at once too busy while lacking in vitality. Housing units that once hosted local workers have been converted into job centers, or as one Pitkin County Commissioner put it, “luxury cruise ships on land.”



The group most likely to buy a 2nd home 55-70 years old. The market will double in the next two decades as baby boomers reach the 55+ age groups

Chart 4

⁴The Northwest Colorado Council of Governments is a voluntary association of towns, cities, and counties in North Central Colorado.

⁵The logarithmic relationship between house size and employment generation found by Clarion was $y = -4.67138e^{(0.000328x)+2.01}$ which meant that they predicted a 12,000-square-foot second home would create about 4.0 jobs (or FTEs) for post-construction operation. Of course, job generation is thought to be a function of the homeowner's wealth which is only roughly correlated with house size. A similarly sized locally owned home was predicted to generate far less employment, about 24 jobs for a locally owned house.

Resort communities have historically been expensive places to live. The relatively recent exponential growth in housing prices and the influx of baby boomers (Chart 4) is a qualitatively as well as quantitatively different phenomenon driven by three changes in the national economy. First, the number of baby boomers in their prime second home buying years has increased dramatically and will continue to do so for the next decade. Second, wealth has become even more concentrated in recent years with the result that the baby boomers have the financial means to outbid locals and others for resort housing properties.

The following chart (Chart 5) is based on the AARP's study of Net Financial Worth (Net Worth-Home Equity) for baby boomers. Each of the 100 squares below represents one percent (1%) of the total Net Financial Worth, and the colors represent how much of this net worth is controlled by the respective groups. For example, the yellow represents the percentage of the wealth controlled by the top 1% of baby boomers; the purple squares represent what the 2%, 3%, 4%, and 5% control, and so on.

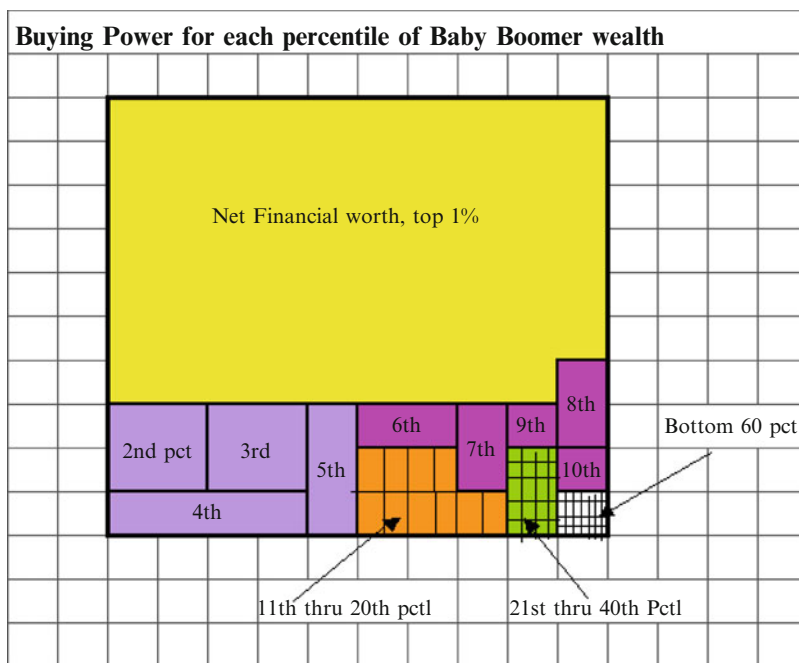


Chart 5

Without government interference in the form of zoning and various land use controls, it is not difficult to imagine the above distribution as a plat map for a hypothetical resort community after sufficient time has passed for local residents to sell their property to the highest bidder. By many measures, the concentration of wealth has increased considerably in the past few decades with the result that the modest increases in wealth enjoyed by the bottom 60% have left them unable to compete for prized property.⁶ Of course, the USA has always had a fairly top heavy wealth distribution (as The Economist and others note) in spite of contrary egalitarian ideals.

⁶The fact of increasing wealth concentration is not seriously debated; see for example, The Economist, January 6, 2005, *Ever higher society, ever harder to ascend*. There is a wealth of literature on wealth concentration and a measurement called the Gini Index that measures this phenomenon on a scale of zero (perfect equality) to 1 (one person owns everything). The current index is about .43, and has been rising steadily since the early 1980s. See <http://www.nber.org/data-appendix/w8467/w8467-app.pdf>, National Bureau of Economic Research - income data.

Other factors contribute to the demand for real estate that is reshaping resort communities including the ability to more easily access resorts and stay connected with the outside world from rural locations.

Tax policy also plays a significant role. In general, the tax policy enacted in the 1980s was clearly geared to those most likely to buy luxury properties to begin with. Perhaps more importantly from a rural resort perspective, genuine tax reforms supported by liberals and conservatives alike tilted the playing field toward resort and real estate properties. Prior to 1986, it was possible to parlay a relatively small investment into large tax shelter using borrowed money to leverage the available deductions, depreciations, and credits. The result was investment geared toward harvesting tax savings rather than profits and a boom in office real estate, gas pipelines, chinchilla farms, and any number of unprofitable schemes. The changes in 1986 basically leveled the playing field, making resort real estate much more attractive as a place to invest accumulated earnings.

Many resorts report 1986 as the year their world changed. Chart 6 below shows how Pitkin County, Colorado, where Aspen is located, was affected by the change in real estate tax law. For a number of years prior, a large proportion (>60%) of the workforce was housed in the county as housing was affordable; with the tax advantage of purchasing second home properties, the local housing stock increased in value due to external demand resulting in a significant decline in housing available for the less affluent local workforce.⁷

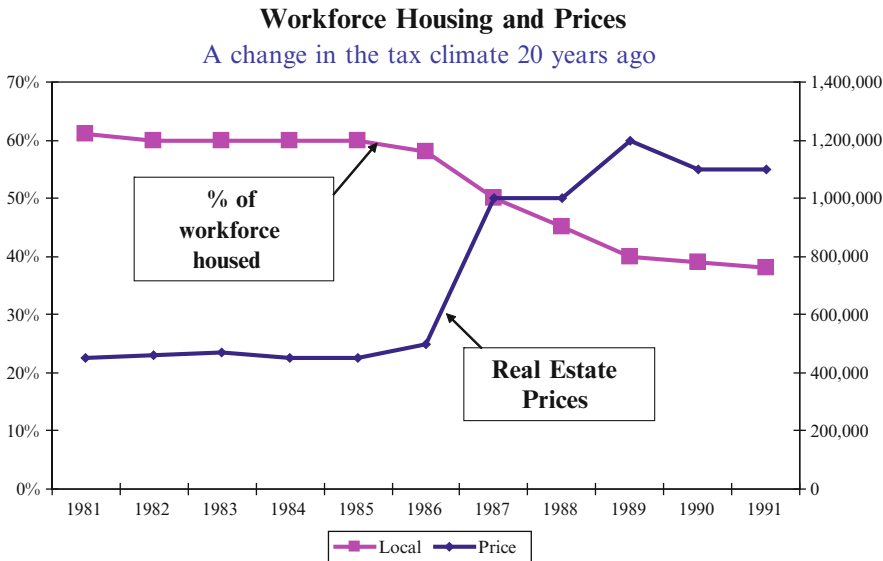


Chart 6

Gentrification, Community Response, and Public Policy

Community response to the changes brought by gentrification is often slow in developing and for good reason. To begin with, the first properties to be gentrified are sometimes undesirable in appearance and serve the least politically influential residents. Policy makers and elected officials tend to be insulated from housing market failures since they are most often drawn

⁷ Aspen Pitkin Housing Authority 1993 study for the Aspen Area Community Plan is the source for the percentage of workforce data. Aspen Board of Realtors is the source for median free-market house process in dollars adjusted for CPI-U.

from the middle-aged and middle- to upper-class groups. In resort towns, longevity is often a critical credential for electoral success, and thus candidates are typically well established and own their residences. Many community leaders earned their prominence and position through hard work and perseverance. The difference between their difficult struggles and the near-impossible market conditions faced by the next generation are not immediately obvious especially to a group of people usually more celebrated for “people skills” than for their inclination to quantitative analysis.

In addition, the transformation of a resort into a second home-dominated community may be a welcome change in its early phases as the benefits are clearly more tangible. Property values rise, and unused rental housing stock (if any) may be put to improved use. Property may be spruced up in appearance, jobs are generated, and sales tax revenue may increase. Many of these changes accrue directly to members of the policy making class as long-time residents and property owners.

The darker aspects are slower in appearing. As the real estate/second home industry ascends, competing uses are gradually crowded out as leases expire. Businesses serving the newer, older, more affluent residents including art galleries, higher end restaurants, and retail fur stores displace locally serving businesses such as shoe repair shops, general merchandise purveyors, and other high volume, low margin enterprises.⁸

The first noticeable adverse impacts of gentrification are often traffic congestion related to the need to import a larger workforce and loss of familiar, rural view-scapes. The traffic issues may be addressed symptomatically through traffic studies, parking plans, and capital expenditures. Scenic issues may be addressed through open space purchase programs or often controversial attempts to preserve historic property or limit development using scenic criteria such as ridgeline review, increased setbacks, or architectural controls.⁹

None of these policies address the root cause of a community’s transition and may serve to make the community even more attractive to part-time residents and retirees. Wider highways and transit systems may speed the exodus of the middle class to newly accessible subdivisions. Architectural controls and open space protection may limit the supply of residential development, driving the prices up further.

Recognition of the fundamental change in character (and loss of characters) is usually slower in coming. Traditional zoning schemes and master planning are usually focused on physical facilities and land forms usually emphasizing a perceived need to separate incompatible uses and foster tax revenue-producing enterprises. Notions of new urbanism, mixed use, and walking neighborhoods are not widespread. The loss of emergency service personnel and middle level professionals such as teachers, nurses, and skilled crafts people is often the first indicator that the community transformation is more than a transient or superficial change. The increased difficulty in staffing a cherished local hospital or school is anecdotal grist for the local media and may turn public attention toward changes in character and the plight of the younger, less affluent members of the community.

⁸One of the competing uses that transform commercial districts is residential housing. Most zoning schemes contemplate commercial development as a “higher and better” use and therefore do not prohibit the conversion of property from (*commercial to residential use*). Zoning is more often seen as a means of protecting residential property values from detrimental commercial development. In fact, the earliest zoning cases revolve around the attempts of neighborhoods to protect themselves from the “evils” of bars and gas stations ruining the neighborhood and those battles continue to this day over parking, noise, traffic, and character issues.

⁹Twenty years ago, Aspen was one of the few resort cities in Colorado with a public transit system. Today, virtually every resort community has at least a local bus system, if not, a regional system. The Aspen bus system has grown into a regional carrier providing four million rides per year in 11 towns and three counties, with a \$10 million budget and a system of trails.

Loss of Sense of Place

Isolated anecdotes begin to coalesce into a perception that the community is losing “vitality,” “soul,” or “character.” Parents begin to notice their children cannot afford to live in their own hometown. Others observe that night spots that were once gathering places for the young are disappearing. An influx of foreign immigrant labor becomes more obvious as the immigrants move out of the kitchens and climb the job ladder to more visible and responsible positions.

Although some European resorts have effectively coped with these losses by restricting property ownership and sales to local residents, that sort of regulatory approach has little appeal in the USA. First, it conflicts with notions of property rights and may even be unconstitutionally suspect. More importantly, by the time character and housing issues come to the forefront, it is usually politically impossible to tell the remaining locals that they will not be allowed to cash out for 5 or 20 times their purchase price as their neighbors have done.

Affordable housing and retail commercial zoning protection are effective tools in addressing the character issues; housing programs can provide a foothold for entry level workers and a stake in the community that gives them a means to invest in its future. Housing local residents who are active in the workforce provides a revenue base that may allow locally serving businesses to survive. And essential service workers who would otherwise depart or be forced to depart have the opportunity to stay. Obviously, each worker housed in or near the community’s center is one less who needs to commute long distances to and from work.

Implementation of this workable solution appears to require something of a political denial-bargaining-grief-acceptance process. In the absence of a firm understanding of the economic dynamics that drive gentrification, many public officials and policy makers hope for a market place salvation from their predicament, as if investors, property owners, and developers would suddenly start making bad economic choices for an unarticulated common good.

“Plowing New Policy Ground”

As noted earlier, most in the local policy business do not have firsthand experience with the forces in play during the transformation of a community from a traditional rural resort economy to one based on real estate and second homes. The reality is that there are really three Aspens, three Steamboats, three Vail’s living in parallel but sometimes overlapping universes.

First, there is a migrant workforce, which may or may not have a large foreign component but almost always fills the jobs that were once held by locals. Most of these workers commute into town, some from extraordinary distances, and few of them have any stake in the community or its success.¹⁰ Some may be embittered ex-locals, former denizens of low-income property, or mobile home parks cleared to make way for high-end development.¹¹

One local pastor who serves the foreign immigrant community typically asks one key question of policy makers at regional housing conferences: How often do you meet with Mexican workers on a personal basis? The response to this and similar queries usually demonstrates that few in the

¹⁰While still small, the Hispanic population grew by a factor of 2.5 in the 1990s in Steamboat Springs. In Carbondale, about 100% of the population growth under age 45 was Hispanic. The same is true in Sun Valley, Idaho, where Hispanics were much younger than the population as a whole.

¹¹Aspen and Pitkin County have participated in the purchase of four mobile home parks totaling about 350 units. These neighborhoods were resold as individual lots to former tenants with resale restrictions, approximating the rent formerly paid by the owners.

policy business have firsthand experience with immigrant laborers, their families or their day-to-day experiences. All have interesting anecdotes and urban legends of course but most of what is known is second hand.

Secondly, although about half the second homes in Pitkin County are held by the top 1% of the food chain (definitely the have-lots-mores), there is relatively little social interaction between them and the policy makers. At public meetings, the wealthy are generally represented by attorneys and professional land use planners. Again, anecdotes and legends abound in the absence of firsthand experience.¹²

The remaining group, largely the enfranchised middle and working class, is thus without the benefit of the very tool that brought them to power in the first place, that is intimate familiarity with their constituents and their local economy. Most county and municipal office holders and other board members come to power without the aid of an organized, strategic campaign driven by issues. Absent a crisis or the sudden arrival of Wal-Mart, most campaigns are about personal qualities, general reputation in the community, and informal networking.

The policy makers are thus deprived of their most familiar and reliable policy making tool, personal experience, and firsthand knowledge. Casual observers are often struck by the detailed knowledge of individuals and properties carried by local officials who can go on for hours about the condition of an old bridge at the end of an obscure road, the status of a boiler contract 20 years ago, or a controversial land use approval. As property values soar, the stakes are higher, and the ability of consensus-oriented government to reach a middle ground is lessened. Often, the first response from local government facing housing shortages and related problems is to focus on “working with” the developers or amending the land use code to make applications for affordable housing easier.¹³

Changes Even in Commercial Districts

Local leaders confront a similar dilemma in trying to preserve a vital, local-serving commercial core. Intervening in the business sector is less familiar and even more controversial than proactive housing efforts. The “shopping experience” has become an important amenity for resort economies as Americans become older and less athletic. Ski resorts are finding that the quality of that experience is a major factor in choosing a resort.

The traditional rural resort economy and government financing schemes assume that the basic economic driver is a large number of outsiders coming to town, spending a lot of money, staying for a while, and leaving in time for the next wave to come, and do the same thing. In important ways, this model is in competition with a second home-based economy which thrives on fewer people making larger purchases. The more powerful second-home economy may “crowd out” or

¹²One of the goals of the ongoing second home research at NWCCOG is to learn more about this group. As noted, the census provides little distinction between the mere haves (\$250,000 a year administrators, for example) and have a lots. The goals and needs of this group are critical to planning, for example, how many second home owners are hoping to eventually become permanent residents, what services do they need or want, and what community activities they will support.

¹³While tinkering with land use codes is an effective solution for the types of problems traditional resort economies face, the available incentives such as fee waivers or one-step review processes are inconsequential relative to the investment alternatives at stake. Nor does up zoning in and of itself seem to help: there is no way that the market can be saturated with enough housing to bring the price down to affordable levels in high-end resorts. And there is little political will to risk the experiment when the community already feels traffic and construction is a problem.

outbid the local sector for the available commercial space, rendering the downtown commercial core less attractive to both locals and “low-end” visitors.

The sudden replacement of thriving businesses by fractional real estate offices is at first inexplicable to local residents. Local merchants quickly understand the adverse impact of proliferating office uses on foot traffic and browsing. Local serving uses are especially vulnerable as they face rising rents even while their customer base is declining.¹⁴

For about a century, Aspen Drug, a popular and successful operation that could be considered an “anchor” for the adjoining Hyman Avenue Mall, occupied a prominent downtown corner. It served for most of the last 50 years as a provider of tourist-oriented, general merchandise and souvenirs in addition to prescription drugs and was described by the former tenants and owners of the business as very profitable. A short while ago, the space was converted into a “Discovery Center” for the as of yet unbuilt Snowmass Village Base Village project.¹⁵

Capitalizing on the Community’s Investment

By the time the underlying demographic changes and driving forces become apparent at the local level, many options are closed. Local property owners have a vested interest in capturing the appreciation that has accrued. The new arrivals have an interest in protecting their investments. Simple up-zoning to create a supply side answer to retaining or replacing the “lost generation” is not only unlikely to work given the demand for high-end properties but is also unlikely to be politically possible. Creating housing through direct intervention in the market or by providing access to the market for working locals is not as simple as it sounds.¹⁶

Assisting locals in accessing the current market requires careful analysis. One danger is that in the absence of a deed restriction or other limitation, the newly enfranchised locals may “flip” their rapidly appreciating property in the near future. Several communities have had bad experiences with creating enhanced access to the market at a subsidized or other favorable price. For example, Boulder, Colorado, required a developer to make a certain number of units available at an artificially low price as a condition of approval of a more lucrative project. The only restraint on the resale of the lower priced units was that they could not be sold within a year. All of the units were purchased at the lower price and sold a year and a day later at the higher market prices inaccessible to locals. “We’ll never do that again,” was the county planner’s response to that outcome.¹⁷

Pitkin County had a similar experience with a mobile home park. The county demanded that the mobile home lots be sold at a price equivalent to the rental income stream as a condition of a redevelopment of a larger adjacent property. Many of the mobile home park buyers later asked that they be allowed to sell their lots without restriction. The county held firm although litigation was threatened and some concessions were made.

¹⁴Several resorts including Aspen and Park City have contemplated or adopted zoning to prohibit offices uses in ground floor spaces in the commercial core. The effectiveness of this strategy is unproven.

¹⁵Base Village is approximately 600 condominium units and 90,000 square feet of commercial space. It calls for structures much larger and much taller than allowed by the recent master plan. Some affordable housing is included in the project. The marketing target is expected to be the usual 55–65-year-old baby boomers. Pitkin County has objected to the failure of the plan to include substantial road impact mitigation for the primary two lane serving Base Village.

¹⁶It appears that CAST refers to “demand” and “supply” side solutions, that is, access through mortgage financing, down payment assistance, etc., as “demand” solutions and direct creation programs as “supply” solutions. Not to be confused with “supply side” economics or any other hocus-pocus.

¹⁷Vail had a similar unhappy experience when an apartment complex with a 20-year deed restriction had to be repurchased (“bought down”) to preserve affordability.

Affordable housing construction with deed restrictions can be an effective but costly remedy. “Impact” or “mitigation” housing obtained through exactions is generally limited to offsetting job creation or price effects generated by a development approval.¹⁸ The state of federal “takings” law and some statutory law is such that impact fees are not permitted to address existing infrastructure shortfalls. Thus, a community with a goal of housing a certain percentage of its workforce cannot exact part of the shortfall from new development.

Incentive zoning, PUD processes, and pre-annexation agreements are generally more effective tools for going beyond “break-even” housing creation, especially in combination with some system of growth management. If development rights are rationed in some manner, would-be developers may be willing to provide a large amount of affordable housing in return for the right to create lucrative free-market residences. Pitkin County and the City of Aspen have used discretionary “70-30” zoning that calls for 70% affordable housing for every additional 30% free market.

Aspen is blessed with two powerful revenue streams that support the creation of new affordable housing through buy down and preservation of existing units and the construction of new units. Although Pitkin County is home to approximately 2,300 affordable units under varying degrees of restriction, only about 1,100 of those are new construction resulting from city or county action. Others are “buy downs” (such as the trailer parks mentioned earlier and mitigation or 70–30 units provided by developers as a condition of approval). Aspen has a 1% RETT (Real Estate Transfer Tax), approved by the voters in the early 1990s and renewed in the year 2000, both times by a 70–30 margin. Aspen also has a 0.45% housing and day-care tax approved and renewed by similar margins in approximately the same time frame.¹⁹

Given the \$1.6 billion in real estate sales in Pitkin County in 2004, with most of those sales occurring in Aspen, the RETT can provide up to \$10 million a year. That is a fair amount of money but does not provide a great many units given land prices and construction costs of \$150–\$200 per square foot.²⁰

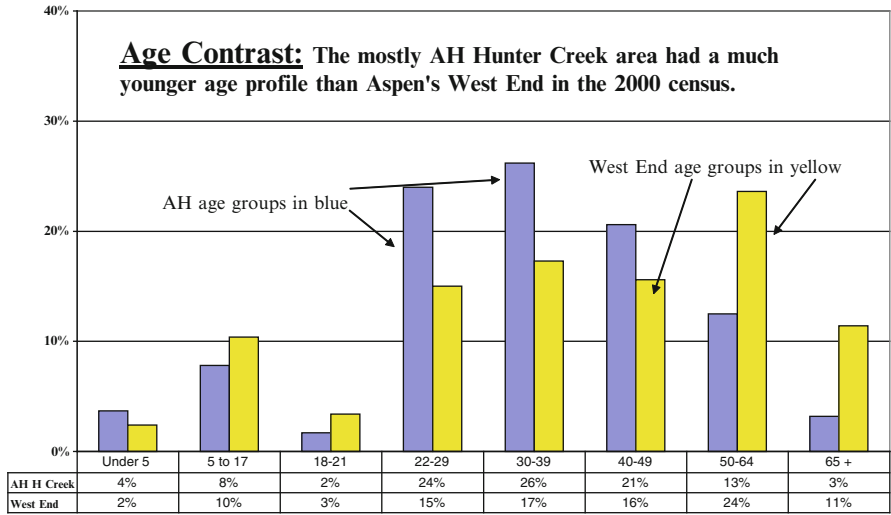
Embarking on a tax and build program takes a certain political courage. New arrivals owning high-end units have mixed feelings about any growth, traffic generation, or scenic degradation that could adversely impact their quality-of-life. They may also recognize the absence or rapid decline of the entire demographic slices of the community can rob “Paradise” of the very vitality that attracted them in the first place. Nonetheless, Aspen and Pitkin County have justly earned a national reputation for creating and preserving affordable housing. While the median age for free-market housing owners is approaching 60 and the median age for all residents in such units is about 46, the median age for affordable housing occupants was about 36 in the sample studied from the 2000 census.²¹ One significant advantage of the deed restriction is that the units tend to “turn over” to younger buyers. While some residents within the program have aged, the median age appears to have stabilized around 36.

¹⁸Pitkin County formerly based affordable housing requirements on the presumed impact high-end development had on the local market. This approach makes little sense when a project’s economic impact might move the typical housing price from very unaffordable to extremely unaffordable. Pitkin County now attempts to measure job generation from residential construction in a manner akin to the measurement of employee generation by retail or other commercial activities.

¹⁹The first \$100,000 in sales are exempt from the housing RETT. An additional 0.5% RETT supports the historic Wheeler Opera House. You might have seen the author of this chapter there in 1983 appearing in the Marriage of Figaro but probably not.

²⁰Land prices are also driven upward by federal and state ownership of areas surrounding resorts. Pitkin County, for example, is about 87% national forest and Bureau of Land Management land.

²¹The census data is, of course, not classified by “free-market” and “affordable” units. However, some census blocks are almost purely one or the other. About 918 affordable units in nearly “pure” census blocks were studied for age and number of school-aged children per unit along with a like number of free-market units in almost “pure” census blocks. Another 230 free-market units were matched against voter registration records to check the conclusion. The voter match project found a median age of 60 for those owners. Pitkin County also did a community survey in 2004 that showed affordable housing owners to be much younger than free-market residents.



A review of census data for the year 2000 found the predominantly affordable housing in Hunter Creek had a much different age profile from Aspen's West End. The largest age group in Hunter Creek was the 30-39 set while in the West End the largest group was 50-59. Other AH neighborhoods also showed a much younger age profile than the city as a whole.

Chart 7

The above chart (Chart 7) contrasts two census neighborhoods from which detailed age data is available. You will note that in the West End (free market) neighborhood, the largest age demographic is 50–64 with almost a quarter of the residents falling in that category.

A word of caution is in order regarding “Base Villages” and other development solutions to declining vitality. Many resorts (e.g., Copper Mountain, Aspen Highlands, Whistler, and Snowmass Village) have embarked on massive development projects in hopes of restoring vitality. The argument is that allowing hundreds or thousands of fractional or condominium units will allow an infusion of capital investments in ski infrastructure and amenities. Such proposals are properly viewed with healthy skepticism.

First, it must be kept in mind that the real estate is typically marketed to the 55–65-year-old set. Notwithstanding the extremely vigorous lifestyle enjoyed by many in this demographic, it simply is not a 7-day-a-week skiing, partying, and dance crowd. As noted, a good many resorts are oversupplied in this demographic with little indication that the influx of the AARP eligible has restored vitality to any of them.

In addition, high-end luxury unit sales are service employee intensive, meaning more workers will be drawn to a resort putting further upward pressure on whatever housing stock is within their reach. Transportation systems will also be stressed by the need to import service workers. In at least several instances, this strategy has failed. At Copper Mountain, in Colorado, sources close to the developer claim that the project’s retail operation is in financial trouble. At the Aspen Highlands, predicted retail revenue at the base village is less than half the promised level.²²

²²The Aspen Highlands base area did lead to the replacement of aging ski lifts but, thus far, no dramatic increase in skier numbers. Although the retail enterprise is admittedly a failure in spite of hard work on the part of local merchants and low rents, that does not mean the developer took a loss overall. The real estate is apparently selling well and at high prices. The Aspen Skiing Company is seeking approval of a larger base village at Snowmass and blames the lack of vitality at the Highlands on the county commissioner’s failure to approve more units. The open question remains, however: would three times as many 60-year olds create vitality at Aspen Highlands?

High-End Second Home Development in Colorado

During the mid-2000s, recognizing the need to have a better understanding of the economic and social effects of second homes on mountain resort communities, the Northwest Colorado Council of Governments (NWCCOG) on behalf of towns and counties in its region conducted a three-part study (Venturoni 2004). The NWCCOG is a voluntary association of county and municipal governments in North Central Colorado, a region that was the fastest growing within Colorado from 1990 to 2000 with an overall 73% population growth. The Hispanic population in this region during the same time period experienced a 268% growth. This research did not specifically address the identification of why this population grew so fast but presumably, it is at least partially driven by the types, number, and pay level of jobs emerging in the region and the unwillingness of other ethnic groups to pursue these jobs. Also, over 70% of the state's skier visits occur in this region which includes a strong second home market and high real estate values. Ski resorts such as Aspen, Vail, Breckenridge, and Keystone have become the anchors for such change across the four-county study region.



This study was guided by a Steering Committee consisting of representatives from the NWCCOG member towns and counties; it was funded by a Colorado Heritage Grant from the Colorado Office of Smart Growth. The study area included Eagle, Grand, Pitkin, and Summit counties. These four counties include a number of the world's premier ski resorts. Specifically, the study region included Summit County (Keystone, Breckenridge, and Copper Mountain ski resorts), Eagle County (Vail and Beaver Creek), Grand County (Winter Park), and Pitkin County (Aspen and Snowmass). Collectively, these areas hosted approximately 8 million skier days during the 2003/2004 season (Colorado Ski Country USA 2004). With a combined population of less than 100,000 people, this region experienced over 7,000 property transactions in 2003 alone with an aggregate value exceeding US \$3.8 billion (Blevins 2004; U.S. Census Bureau 2005).

The research questions addressed the effects of second homes on housing prices, on the number and types of jobs generated, on community services, and on the overall economy. The study also assessed the usage patterns of second home owners and the effects on community values and social structures.

It is important to note that a good deal of the landmass (approximately 78%) within the four counties is state or federally owned, thus limiting geographical space available for current and

future second homes. Of the 1,688 square miles within Eagle County, only 21% of the land is privately held. In Pitkin County, 83% or 970 square miles is owned and managed by the US Government. Of the available privately held land, due to the occurrence of wetlands and slopes too steep for development and land dedicated by local government for parks and open space, the potential for development is even less. For Grand County with 1,850 square miles, 27% of the landmass is privately held; for Pitkin County, 17% is privately held; and for Summit County, with 608 square miles, only 22% of the land is privately held. Due to federal statutes guiding the use of federal recreational lands, although such landmass might seem both plentiful and an appropriate use to some, such land is not available for the placement of housing.

Regarding the available labor force and projected job growth, although skier visits had remained somewhat constant, about 8.5–9 million annually²³ for the four-county study region since 2000, job growth continued to outpace available workers.²⁴ In 1999 in Summit County, with annual skier days averaging about 3.5 million, there was a shortage of over 4,000 workers. In Eagle County, there was a labor force shortage of 9,797 workers in 1997, a shortage that was expected to grow substantially (estimated to be 20,000 or more) by 2020²⁵ potentially increasing the number of workers either needing affordable local housing or being required to commute to their place of employment.

Housing for the region's workforce, a most critical component of the second home phenomenon in many resort communities, was limited due to both housing inventory and cost. In the early stages of a resort tourism economy (Butler 1980), workers are found from the existing pool of community residents, and thus housing is not a significant issue. As a tourist area moves into what Butler identifies as the consolidation stage, imported labor with accompanying housing needs becomes a characteristic of a popular tourist area. Up until 1987, over 50% of the workforce for Pitkin County was housed locally; it has since dropped to less than 40%. This drop corresponded to the general time frame when real estate costs began to increase dramatically in the county, particularly in the resort town of Aspen, Colorado, located in Pitkin County.

Study Components

Typology of Second Homes

To determine the profile of second homes for the study region, county assessor databases from the four counties were collected and assembled into a GIS database of over 64,000 property records. The database reflected ownership information dated from 2000 to 2001. These records were re-coded to reflect common fields including type of unit (e.g., single family home, condominium), value of unit, square footage, and year built. Because there is no indicator within County Assessor records for whether a home is being used as a second home or local residence, a code was added to indicate the current usage of the housing unit based on where the property tax assessment notice was being sent. Out-of-county addresses were marked as "second home." Using this method, it was determined that 60% of the homes in the four-county study area are second homes. This ranged from a low of 49% in Eagle County to a high of 67% in Summit County.

²³Colorado Ski Country. (n.d.) Skier Visits report. Retrieved March 29, 2005, from the Colorado Ski Country Web site: <http://www.media-coloradoski.com/index.cfm?cid=7547,7549>

²⁴Due to the 9–11 attack on the World Trade Center and the general economic slowdown, the counties experienced short-term job losses during 2001 and 2002.

²⁵Projections provided by [Colorado State Demographers Office](#), Colorado Department of Local Affairs.

Analysis of property values in the study area showed the average price of a single family house in June 2003, in Eagle County to be \$785,000 whereas for a multifamily unit (duplex, triplex), the average was \$443,000. In Summit County, the average at that time for single family housing was \$486,000; for multifamily, \$255,000. These high-end housing costs and related issues were prominently noted in a July 2004, Denver Post (Denver, Colorado, USA) newspaper article titled "Resort sales on a record pace."²⁶ The writer indicated that the second home real estate market was being bolstered by "...strengthening stock market, baby boomers boasting more discretionary income, lower interest rates luring locals out of the rental pool and climbing prices" and noted that "High-end buyers are driving the surge, especially in Aspen and Pitkin County." He also noted that "New homes are becoming rarer. New land becomes unavailable. Space gets tighter and values soar."

The standard US home market value in 2004 was roughly \$100,000; in Pitkin County, it was in excess of \$1 million; in Eagle County, the average exceeded \$550,000. The percent increase in home market values from 1998 to 2004 for the standard US city was about 18%; for Eagle County, it was in excess of 75%; and for Grand County, it was over 60%.

Further analysis showed that as the value of second home property increased, so did the percent of second home ownership. For example, 74% of those properties valued in excess of \$5 million were owned by second home owners whereas only 57% of those properties valued in the \$100,000–\$200,000 price range were determined to be second homes. Additionally, a large percentage of the study area's housing stock with the highest square footage is owned by second homeowners. Sixty-seven percent of the homes of 7,000 sq. ft. or more were identified as second homes as were 59% of those in the 4,000–4,999, 64% of those in the 5,000–5,999, and 64% of those in the 6,000–6,999 sq. footage range. The most common types of second home ownership were condominiums (72%) and single family homes (48%).

Survey of Second Home Owners and Residents

In order to learn about utilization, shopping patterns, and behaviors of second home owners, it was necessary to seek information directly from the home owners. It was also important to determine the similarities and differences of attitudes and opinions of both permanent residents and second home owners for future planning. A questionnaire was sent to a sample of all home owners (local residents and second home owners) in the four-county study area in April 2003; of the 4,300 questionnaires mailed, 1,346 were returned, 721 from second home owners, for an overall useable response rate of 32% (standard error=2.60%).

Demographic Characteristics

The demographic questions asked in the questionnaire provided for a comparison of second home owners in the region with those described in the National Study of Second Homeowners published in American Demographics (Francese 2003a, b). This national study identified 55–64 as the age cohort most likely to purchase second homes and forecasted great growth in the second home industry nationally as baby boomers (1946–1964) are just beginning to enter this age cohort. It was reported that second home owners nationally tend to be high-income, high-asset, highly educated, middle-age, or older couples, with children nearing adulthood or children no longer living at home. This study confirmed all of these characteristics but showed much higher

²⁶Bleven, J. Denver Post, July 4, 2004. www.denverpost.com. Retrieved July 5, 2004.

income levels and even a greater likelihood to be in the 55–64 age bracket than the national study. Median household income reported in the four-county study area for second home owners was \$208,330; for residents, \$74,416.

Social Indicators

The questionnaire asked second home owners to indicate the reasons why they purchased a second home in the study area. Allowing for multiple responses, second home owners indicated most frequently that it was due to the availability of recreational amenities (83%) followed by the proximity to ski resorts (73%) and the scenery and surroundings (72%). Forty-nine percent (49%) indicated that they had purchased their second home for the investment potential. Fourteen percent (14%) of the second homes were being used as full-time rentals and 32% as part-time rentals, while 50% of usage was by owner, family, and friends. Second home owners were more likely to shop locally (0–10 miles), while local residents indicated that they were more likely to shop in the “Extended Region” (30+ miles) including the Front Range (Denver, Colorado) area. This research did not attempt to measure the level of expenditures by second home owners; such measurement was to be implemented through a follow-up panel research design. Local residents historically have purchased daily necessities locally, saving their large shopping experiences for out-of-area, big box, locations.

Both second home owners and local residents indicated similar recreational interests with 79% of residents and 82% of nonresidents indicating their favorite activity as being walking and jogging. Popular among both groups was downhill skiing (72% resident, 79% nonresident), hiking (79% resident, 75% nonresident), and mountain biking (52% resident, 45% nonresident). When asked to assess the quality of the recreation offerings, 90% of the second home owners indicated strong approval of the quality of the recreation opportunities (83% of residents indicated the same), 86% (73% for residents) indicated strong approval for the quality of the parks, trails, and open space, with public safety (66%) and the appearance of the community (63%) being third and fourth in terms of the assessment of quality by second home purchasers.

High on the list of natural resource amenities for second home purchasers were the scenic/visual qualities of the study area (95%), the quality of the air (95%), the quality of the water (95%), the recreational opportunities (91%), and the parks and trails systems (91%). These values were almost identical to those expressed by the residents with 90% of residents indicating the importance of the scenic/visual qualities, 91% indicating the air and water quality, 79% indicating the recreational opportunities, and 78% indicating the importance of the parks and trails system.

Economic Indicators

Of importance when projecting the economic impact of second home owners is the pattern of use. The Full Time Household Equivalency (FTHE)²⁷ for a single family residence was 29% of annual usage and for a condominium, 23%. There was no significant difference found in usage either by income level or value of residence. Respondents indicated 41% level of use from December to March, 12% from April to June, 32% during July and August, and 14% from September to November.

Of importance in policy development and planning is an understanding of the current and projected future use of second home properties. Fifty percent (50%) of the responding second

²⁷Full-Time Household Equivalency was a term created by the Steering Committee to describe the extent to which a housing unit was occupied on a full-time basis by its owner.

home owners indicated that their housing unit was currently used by “owner, friends, and family”; 32% indicated that their unit was used as a part-time rental while 14% indicated that their unit was part of the full-time rental pool. Twenty-one percent (21%) indicated that their unit was used only by the owner.

Regarding future use of second home properties, forty-seven (47%) percent indicated that they intended to “increase personal use of their property,” while 44% suggested that they would “maintain their current level of use.” Regarding increasing the usage by friends and family, 28% indicated yes, while 11% indicated that they intended to retire to the area and use the property as a permanent residence. Seventeen (17%) percent indicated that they were likely to use the residence in the future as a part-time rental unit while 7% indicated that they intended to use the residence as a full-time rental property. This intent to remove their housing unit from the full-time rental pool by 7% of the respondents would suggest that there will be fewer opportunities in the future for local residents and workers to rent such property within the local community.

Economic Base Analysis

In order to answer the questions related to jobs generated by second homes, it was necessary to identify the economic drivers for the study area; thus, an economic base analysis was conducted (Lloyd Levy Consulting 2004). This analysis identified that second homes, winter visitors, summer visitors, resident income,²⁸ and other factors²⁹ were the basic drivers that were generating both basic and secondary jobs. This economic analysis addressed three questions: (1) How large is the economic base of each county? (2) What share of the economic base is due to second homes or other drivers? (3) What is the total effect of second homes and other economic drivers, as measured by the basic and secondary jobs they generate (Lloyd Levy Consulting 2004, p. 5)?

“Total spending associated with the economic drivers of the four-county region, including Eagle, Grand, Pitkin and Summit Counties, was estimated to be more than \$5.3 billion in 2002. Across the region, second home construction and spending was estimated to be the largest driver, supporting about 31,600 jobs or 38% of all jobs. Winter tourism, including skiing, supported about 22,300 jobs, or 27% of total jobs, and resident spending of non-local income supported about 13,300 jobs, or 16% of total jobs” (Lloyd Levy Consulting 2004, p. 14). Also, this economic analysis projected that across the region construction of housing units 3,000 sq. ft. and larger supports 2,461 direct basic jobs while the construction of housing units less than 3,000 sq. ft. supports 1,612 direct basic jobs. The analysis also projected that spending by second home owners of units less than 3,000 sq. ft. supports 12,796 direct basic jobs while spending by second home owners of units 3,000 sq. ft. or greater accounts for 4,354 direct basic jobs (Lloyd Levy Consulting 2004, p. 14).

Summary of Colorado Study Findings

There are a number of findings from this study that are important to understanding the implications of second home development in the region and for future planning and policy development for the study area: first, the extent to which second homes dominate the housing market limiting

²⁸Resident income includes retiree income, transfer payments, dividends, interest, and rent.

²⁹This includes mining, manufacturing, agriculture, and Interstate I-70 thru-traffic expenditures.

the housing stock available to local workers; second, the uniqueness of this specific study due to the degree of wealth that is being invested in second homes exemplified by both their size and value, making it virtually impossible for local residents to afford their purchase; third, the documentation of shopping and recreational patterns which is driving related amenity development; fourth, the determination of the degree to which the second home economy serves as an economic driver for the region and the dramatic impact future second home development will have on job creation; and fifth, the establishment of a methodology that can be used to systematically track this development into the future.

It is important to note that local residents and second home owners both hold similar “values” regarding community amenities; they also indicated similar recreational interests. Both groups indicate that they visit or live in the region primarily because of these qualities not because of the potential economic gain of property ownership. Thus, both groups have good reason to protect the area’s resources and the highly rated quality-of-life that the region currently provides. Both groups should be keenly interested in policies and actions that maintain the area’s economic and social well-being.

The “*classic*” second home owner in this region will have a median household income in each of the respective counties of Eagle: \$301,408, Grand: \$105,660, Pitkin: \$277,500, and Summit: \$148,750. Their second home usage would be approximately 90 days per year. They will not show up in population counts, do not vote locally, and do not participate in the local workforce. They are predominantly aged 55–64 and may own a third or fourth home.

The “*affordable*” local resident will have a median household income in each of the respective counties of Eagle: \$62,682, Grand: \$47,756, Pitkin: \$59,375, and Summit: \$56,587. Their home usage will be approximately 330–360 days per year, and they live in subsidized housing or bought into housing while prices were still affordable. They show up in population counts, vote locally, and participate in the local workforce. They may have lived in the area for a long time and are predominantly aged 30–75+.

The workers in the four-county study area employed in the second home basic industry and their families require housing and a wide range of private and public community services. The workers providing these services, in turn, have the same needs. Typically, in a second home resort community, there is an initial development and maturation of a traditional tourism industry. However, over time, second homes become a large and often dominant part of the physical, economic, and social landscape. Their development creates a demand for workers above that of the traditional tourist industry, especially in housing construction but also in their maintenance, operation, and use. As the number of second homes increase, the demand for workers to support the second home industry increases as well. Knowledge of the effects of the second home industry is essential to resort community planning including understanding and anticipating the secondary or “multiplier” effects. To not understand the effects can lead to shortages and to major conflicts among the users of the various resources of the area.

Second homes take up large amounts of land in Colorado mountain resort areas where developable land is already in short supply. Due to steep slopes and wetland areas, there is an ever-diminishing availability of good development land resulting in pressure to both open up environmentally sensitive land parcels for housing construction and to allow for the building of employee housing on US Forest Service land. As a result, the second homes’ values and the land surrounding these homes rise above that normally paid for worker housing. As their numbers increase, and the land available for development decreases, a dilemma is created. Second homes have generated the need for more workers, but the rise in property values and subsequent housing costs have made it difficult for the workers to live within a reasonable distance of their place of work. This has resulted in “down valley” employee housing development, the emergence of living communities for the resort workforce which in and of themselves become full-service residential environments. With full retail services, churches, recreation

areas, and affordable housing, such places begin to compete for the available rural resort workforce.

To address this issue of affordable housing for workers, a variety of public and employer-assisted housing techniques are being implemented although it is too early to determine to what extent they are contributing to the sustainability of these mountain resort communities. On the private side, such techniques include down payment assistance, interest rate buy downs, loan guarantees, matched savings plans, home buyer education, damage deposit loans and guarantees, rental/purchase guarantees, construction financing, and rent assistance. On the government side, the choices have been to finance, build, and manage affordable housing units or to provide incentives or requirements for the private sector to meet affordable housing needs for workers.³⁰

Traditionally, residential homes and their neighborhoods have provided workers with a decent home and adequate community services. However, second homes are different in that they are not just residences but an industry creating a demand for workers. Second homes drive up property values, including residential housing for workers. Because of this, it becomes especially important for elected officials and community planners to understand and estimate the secondary effects of second homes in tourist-based economies. With this information, policies can be developed by local governments to protect the natural amenities and provide for the social needs of citizens with each new development and to influence the growth in the economic drivers themselves. To ignore this information concerning second homes within the study region and beyond, casts social and economic fate to the wind.

Creating a sustainable resort community or area implies some notion of a self-contained community with a diverse demographic base not overly dependent on imported labor. "Theme Park" resorts where the residents are basically drawn from a demographic monoculture serviced by nonresidents has well documented adverse social and environmental impacts. Preserving a vital community requires an understanding of the basic economic drivers and social forces that drive resorts toward the Theme Park model. In the absence of understanding these forces and their results, communities may be tempted to adopt policies that address only a few symptoms without grappling directly with root causes.

Conclusions and Observations on Second Home Development and Rural Quality-of-Life

Higher-end second home development in rural resort destinations can be considered a mixed bag creating substantial positive and negative outcomes. On the one hand, it provides for major economic development opportunities due to the potential of increasing housing and land values, the creation of construction and service jobs, and the development of business opportunities. On the other, such development can escalate the cost of housing to the point where it drives out the workforce and long-term residents and turns communities into simple playgrounds for the occasional visiting homeowner negatively affecting place attachment and sense of community. The following are some observations and conclusions based upon the Colorado experience.

1. High-end second home development can become an economy in and of itself creating more jobs in construction and service for second home owners/users than does the traditional tourism economy.

³⁰In Aspen, Colorado, the Real Estate Transfer Tax is dedicated to the purchase of affordable housing units.

2. Second home communities are dependent on an immigrant workforce but are not prepared to integrate such families into the fabric of the community whether that be schools, community governance, or housing. High-end second home communities regularly face an employee shortage.
3. The uniquely high price of housing in the high-end rural resort real estate markets of Colorado makes it virtually impossible for long-term residents and necessary workforce to live in the community.
4. The marketplace cannot regulate itself effectively regarding both affordable housing and affordable retail – government policies are necessary to maintain balance in these important areas of a regions tourism economy.
5. A community's "sense of place" is altered significantly when the majority of "residents" and property owners are simply occasional visitors.
6. A revenue stream such as a real estate transfer tax to address and mitigate issues such as affordable housing is almost imperative; deed restrictions are proving to be a useful tool.
7. Limited private land for expanded housing development increases the pressure to develop on environmentally sensitive areas or on federal lands.
8. Second home owners and full-time residents hold similar values regarding the reasons they are attracted to their respective communities and share similar reasons to protect the area's resources.
9. Down valley or bedroom community development for resort employees is inevitable for those employed in high-end rural resort communities.
10. Rapid growth is diminishing the small town values and heritage cherished by so many, and development is disrupting open ranch and farmlands as well as natural resources.
11. Existing land development regulations have proven inadequate to deal with these many and varied pressures.

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Chapter 36

The Effect of Tourism on the Housing Market

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Introduction

Over the past 30 years tourism destinations worldwide have experienced inflows of national and international recreation capital, as the result of increase in demand for recreation services and holiday accommodation, the latter both for use and investment purposes. The increase in demand for holiday housing has been the result of socioeconomic changes, such as expansion of wealth, increase in the lifetime flow of earnings (Müller et al. 2004; Müller 2002; Williams et al. 2000), longer periods and greater value given to leisure time, rising number of retirees with disposable time and income (Norris and Winston 2009), and has been to a great extent facilitated by the improved access to communication and transportation (Gustafson 2002; Magalhaes 2001; Williams et al. 2000). Moreover, in the case of international tourism, the formation of a globalized property market facilitating the process of purchase of properties abroad (Williams et al. 1997), as well as weak currencies in host communities (Hines 2001), have played an important role in this increase in demand for use and investment in recreation accommodation – where this has been also seen as an income-generating opportunity. As a result, local housing markets have felt the pressure of quantitative and qualitative changes following increased demand for already existing housing stock, as well as increasing interest from developers for the provision of new accommodation.

As Fig. 36.1 shows, there are a number of agents interacting in the housing market of tourism destinations. On the demand side, the *owners* can be either “*pure consumers*” of their residential property, “*pure investors*” (individual or institutional), whose aim is to extract the larger possible

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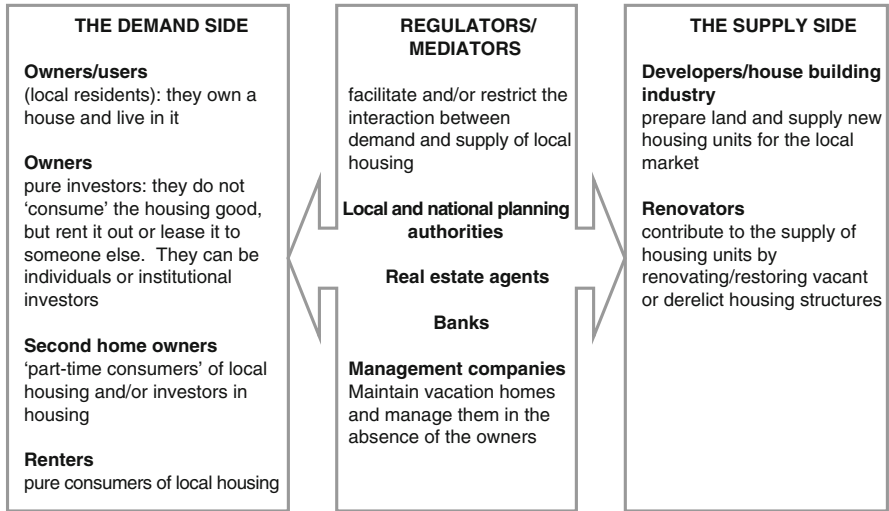


Fig. 36.1 Main agents interacting in local housing markets of tourism communities

revenues from their asset, or a combination of the two (as it often happens with second home owners). Renters are also a vital component of this side of the market as they provide most owners with the necessary cash flow to make their investment viable.

On the supply side, a key role is played by developers and the construction sector in general which are responsible for building new dwellings. However, renovators, often forgotten, are a crucial part of the market too, as they help maintain the existing housing stock via the refurbishment and renovation of vacant and/or devalued units.

The interaction between demand and supply is regulated by planning authorities, both at local and national level, and facilitated by real estate agents and by banks as providers of funds (see Fig. 36.1).

The aim of the present chapter is to examine the way theoretical and empirical literature in the fields of tourism, housing economics, and planning has looked at the effects of tourism on the housing market. Tourism research does recognize the effects of recreation activities on housing, but studies focusing specifically on this issue are very limited both in number and scope and can be classified into two main strands.

The first strand is represented by the “*hedonic price*” literature. The large majority of studies belonging to this first strand are “microeconomic” in nature and assess the impact of tourism on the housing market by regressing individual property prices (or rents) on a series of explanatory variables including dwelling characteristics and, most importantly, tourism amenities. However, the hedonic price method (HPM) can also be used at a more aggregate level to estimate the total impact of the tourism sector on the housing market in different destinations. The *tourism orientation* of different areas is proxied by a composite tourism index. Our empirical application, based on municipal data on Sardinia (Italy), finds evidence to support the hypothesis that the *tourism orientation* of a place is positively correlated with local housing prices. The exercise is suggestive of the usefulness of tourism indexes to “quantify” the largely unexplored impacts of tourism on local housing markets.

The second strand of research includes the growing literature on holiday homes. In particular, we examine the studies focusing on how demand for this type of accommodation in tourism destinations can affect the functioning of local housing markets. In this context, we review works investigating issues of housing affordability, displacement and gentrification in tourism destinations, the role of the supply side, and the policy challenges.

Finally we summarize the state of affairs in relation to the current state of knowledge regarding housing markets in tourism destinations and suggest future research pathways.

Tourism-Related Amenities in the Hedonic Estimation

The mechanism through which tourism affects housing prices is complex and acts on various grounds. In places with a pleasant external environment (natural, man-made amenities, cultural and recreational attractions), people's willingness to pay for housing is expected to be – *ceteris paribus* – higher. Hence, the difference in price between houses located in tourism vs. non-tourism areas should reveal the implicit price of tourism attractions and amenities. This is the basic idea behind the *hedonic price method* (HPM).

Housing is a composite good, whose price depends on both structural characteristics and external factors (Cheshire and Sheppard 1995). In other words, it is a heterogeneous product à la Lancaster (1966), characterized by vectors of attributes; consumers and suppliers buy and sell sets of characteristics rather than the product per se so that the exchanged final price embodies the implicit price of each characteristic.

Under the assumption of perfectly competitive markets, the shadow price, i.e., the hidden value stemming from the equilibrium of demand and supply,¹ of each characteristic can be estimated by regressing the total price of the good on each attribute using what became known as the *hedonic price method* (HPM). This technique developed initially by Waugh (1929) and Court (1939), has been extensively used and further developed in the 1960s and 1970s by authors such as Griliches (1961, 1971) and Rosen (1974). Following Rosen (1974, p. 34) “*Econometrically, implicit prices are estimated by the first-step regression analysis (product price regressed on characteristics) in the construction of hedonic prices indexes.*”

The hedonic function is generally represented as follows (Can 1992):

$$P = f(S, N) \quad (36.1)$$

where P is a vector of housing prices; S is a vector of structural characteristics (such as number of bathrooms, number of rooms, age of building, heating, garden); N is a vector of external amenities or disamenities (such as pollution, crime, public services, socioeconomic status of households, quality of air, closeness to natural amenity).

The hedonic function is normally estimated using a parametric approach² where the hedonic equation is traditionally equal to:

$$P = \alpha + \sum \beta_k S_k + \sum \gamma_m N_m + \varepsilon \quad (36.2)$$

where P is the vector of housing prices; α is a constant; S_k is a vector of structural attributes and N_m is a vector of location characteristics and ε is the error term.

¹In equilibrium, the willingness to pay and the willingness to accept compensation are equal to the implicit price of each characteristic.

²In the nonparametric approach, no functional relationship is assumed between the dependent variable (housing price) and the independent variables (structural, environmental, and qualitative characteristics). For a more thorough discussion of nonparametric or semi-parametric approaches see Sheppard (1999).

House prices are supposed to be increasing in S ($\beta' > 0$: e.g., the higher the surface in square meter or number of rooms, the higher the price) and increasing in N in the case of amenities ($\gamma' > 0$: e.g., the higher the level of public and private services offered by the city, the higher the price), and decreasing in the case of disamenities ($\gamma' < 0$: e.g., the higher pollution, crime, congestion, and noise, the lower the price).

Equation 36.2, either in a linear or logarithmic form, is normally estimated, for simplicity, using ordinary least squares (OLS).³

In this part of the chapter, we look at literature that employs HPM to estimate the impact of tourism-related amenities on house prices in tourism destinations. However, it should be noted that relevant literature is scarce since most tourism research using HPM explores the effect of location amenities on the price of tourism accommodation such as hotels and holiday cottages.⁴ A detailed analysis of this strand of research is beyond the purposes of this chapter; however, we note that this empirical literature finds evidence to suggest that characteristics such as proximity to natural amenities, landscape view, and the physical geography of the tourist destination affect the price at which tourism accommodation is exchanged. For example, Espinet et al. (2003) find that in Spain hotels located near the beachfront are about 19.4% more expensive than others; Hamilton (2007) looking at the Schleswig-Holstein area in Germany finds that areas with *open coast* have higher implicit prices than coastal areas with cliffs and dikes. Similarly, research on holiday cottages rented by firms specializing in tourism accommodation in rural destinations⁵ finds that factors such as *fodder*, *livestock* farming (Le Goffe 2000), and forests (Vanslebrouck et al. 2005)⁶ affect negatively the price of cottages while *permanent grassland* (Le Goffe 2000; Vanslebrouck et al. 2005) and the presence of an *outstanding landscape* (Fleischer and Tchetchik 2005) have a positive effect. Site-specific environmental amenities such as an *ocean or lake view*, or simply the proximity to an ocean or a lake, also contribute to product differentiation and price *markups* in the case of coastal holiday cottages and apartments in North Carolina and in Western Maryland (Taylor and Smith 2000; Nelson 2009).⁷

Using HPM to Estimate the Effects of Tourism on Local Housing Markets: The Case of Sardinia

The literature using HPM to measure the impact of location-specific amenities on housing prices in tourist destinations is very limited. Like in the extensive mainstream housing literature employing the hedonic estimation, willingness to pay for a good quality environment

³In some cases more flexible functional forms are used such as, for instance, the Box-Cox transformation-Linneman (1980), Halvorsen and Pollakowsky (1981). In case of Box-Cox transformation the maximum likelihood estimator is preferred, see again Sheppard (1999) and Cheshire and Sheppard (1998).

⁴Tourism has been extensively approached as a heterogeneous good in the Lancasterian sense (Rugg 1973; Morley 1992; Papatheodorou 2001; Seddighi and Theocharous 2002). The empirical research in tourism uses HPM to investigate two main topics: to analyze the impact on the final price of characteristics of packages holidays (Sinclair et al. 1990; Clewer et al. 1992; Taylor 1995; Papatheodorou 2001; Mangion et al. 2005; Thrane 2005); and to investigate the implicit price of amenities either on the price of tourism accommodation (hotels, holiday cottages, apartments, guesthouse), or on the house prices in resort locations.

⁵See Le Goffe (2000) for the case of self catering cottages in Brittany, Vanslebrouck et al. (2005) for rural cottages in Flanders (Belgium), Fleischer and Tchetchick (2005) for rural cottages in Israel.

⁶On the contrary, Mollard et al. (2007) in a study based on the 1,529 rents of cottages (weekly rate in peak season) in southern France in 2002 find that forestland has a positive effect on rents.

⁷Smith and Palmquist (1994) focus on the willingness to pay for coastal amenities in different tourist seasons (peak, pre-peak, and post peak) and how this affects weekly rents of holiday cottages and apartments supplied by property management firms.

(Quality-of-life of a location)⁸ will be one of the factors affecting house prices. Among the few existing studies, Milon et al. (1984) estimate a hedonic function to explain sale prices of housing located in the Gulf coast of northwest Florida (in total 917 observations for the period 1976–1982). The external amenities are measured using the position and the distance of the properties from the Gulf and the water view. Some further accessibility variables are also added as “controls.” The findings suggest that the *distance from the Gulf* is negatively correlated with housing price (i.e., the higher the distance, the lower the price), but the intensity varies depending on the functional form used for the hedonic equation. They conclude that traditional functional forms impose restrictions that can lead to biased estimates of the values of amenities.

Pompe and Rinehart (1995) apply the hedonic framework to coastal private properties of South Carolina⁹ in order to measure the implicit price of beach quality. The model is applied to data on residential property sales of single family beach houses and small condominiums. Beach quality is measured through the *beach width* and an interaction variable between the distance to the beach and beach width. Beach quality is found to have a positive implicit price on both developed and undeveloped land even though oceanfront *vacant lot* prices are more affected than oceanfront housing prices: increasing the beach width from 79 to 80 ft., increased the value of developed land by \$550 and undeveloped lots by \$754. In non-oceanfront locations, the relationship is the reverse: in lots located one-half mile from the beach, increasing the beach width from 70 to 80 ft. increases the price of development lots by \$254 and undeveloped lots by \$156.

Rush and Bruggink (2000) measure the premium of ocean proximity of single-family houses on Long Beach Island, New Jersey; on the same line Conroy and Milosh (2009) measure the coastal premium of residential housing in San Diego (California) using a large sample of sales prices and characteristics of single-family homes (9,755 in total) in 2006. The variable of interest, the *distance from the coast*, is regressed on housing prices along with structural characteristics, and spatial characteristics. Applying a semi-log functional form, they find that coastal location positively affects housing price (on average a 10% increase in distance from San Diego coast decreases the housing price by 1.46%) and that this effect is nonlinear, i.e., stronger for closer houses while negligible for houses located beyond 6 miles from the coast.

Traditionally, in the hedonic models, natural or man-made tourism amenities are included in the house price estimation function as *separate elements* to “decompose” the willingness to pay for each individual location attribute that characterizes tourism destinations. However, it is possible to use a *composite index* of tourism in the hedonic estimation in order to measure the “aggregate premium” of tourism on house market prices.

Surprisingly, the literature on “tourism indexes” is almost inexistent. One attempt to propose tourism indexes in a HPM context is Biagi and Faggian (2004). In their work, the effects of tourism on the 377 municipalities of Sardinia¹⁰ (Italy) is captured by means of two alternative tourism indexes that measure the degree of *tourist orientation* of the location. The first applies the

⁸See Lambiri et al. (2007) for an extensive review of hedonic studies looking at the effects of QOL considerations on house prices.

⁹They quote the work of Wilman and Krutilla (1980) as one of the first study that uses HPM to analyze beach quality and property values.

¹⁰Sardinia is the second main island of Italy with a surface of 24,089 square km. (7.9% of the national surface) and a coastline of 1,731 km. Its population was 1,651,888 in 1999 (2.8% of the Italian population). Fifty percent of the population lives in the province of Cagliari (located in the South), in which is located also the Capital of the Region. Sardinia relies upon five ports (Arbatax, Cagliari, Golfo Aranci, and Olbia) and three airports (Alghero, Cagliari, and Olbia). The tourism industry in Sardinia starts developing in the 1960s thanks to the presence of high quality marine amenities. Since the beginning, the northern part of the region has been the strongest attraction pole for tourists (particularly the town of Alghero and the so called *Costa Smeralda* close to the town of Olbia). Nowadays, 50% of tourist demand and 50% of all tourist beds are concentrated in the northern part of the island (hotels, camp sites, and tourist villages).

“Van den Waerden proportional ranks” (VdW) method; while the second is calculated by means of “Euclidean distance” (ED). The indexes are based on six main indicators: local expenditures in recreation and tourism sector, number of summer houses, total number of recreational structures (hotels, camp sites, and tourist villages), number of employees in the tourism industry (used to calculate location quotients), distance from the coast, and the altitude.

Tourism Indexes

The Van der Waerden ranking score is a type of fractional rank. In order to understand what a fractional rank is, let us call our observations y_i and the corresponding case-weight W_i with $i=1,2,\dots,377$ (number of municipalities). After defining $A = \sum_{i=1}^{377} w_i$ a “fractional rank” can be expressed as $RF_i = R_i/A$, where R_i is the rank of each observation. Van der Waerden slightly modified this index, thus proposing the following formula:

$$VdW_i = \frac{R_i}{A+1} \quad (36.3)$$

The VdW fractional rank is a simple way of standardizing scores¹¹ so that they range from $1/(n+1)$ to $n/(n+1)$. Note that in this case, higher score corresponds to less touristic areas and vice versa. After having computed the VdW index for each touristic variable separately, the average of the six scores is calculated to obtain the final index of tourism for each location under analysis:

$$INDUTUR1_i = \frac{\sum_{j=1}^6 VdW_{ij}}{6} \quad (36.4)$$

The second index is based on the Euclidean distance, which represents the core of cluster analysis. Cluster analysis is a statistical procedure used to create groups of similar cases from a sample of observations based on the distance of each observation from the centroid of its corresponding cluster, without indicating the direction from the centroid. Therefore, it is impossible to know whether the distance means that the territory under analysis is more or less touristic than the central observation in the cluster. To overcome this problem, in this case the area with the highest scores in the six tourist variables has been selected as a benchmark. Then, the Euclidean distance between this top-touristic place (point B) and each territory under analysis (point y_m) is measured for each of the six dimensions:

$$E_{Ay_m} = \sqrt{\sum_{j=1}^6 (B_j - y_{mj})^2}, \quad (36.5)$$

where $m=1, 2,\dots,377$ are our observations (municipalities).

The final index is:

$$INDTUR2_{y_m} = E_{By_m}, \quad (36.6)$$

where B is the benchmark.

¹¹For alternative ways of standardizing scores, see Blom (1958) and Tukey (1962).

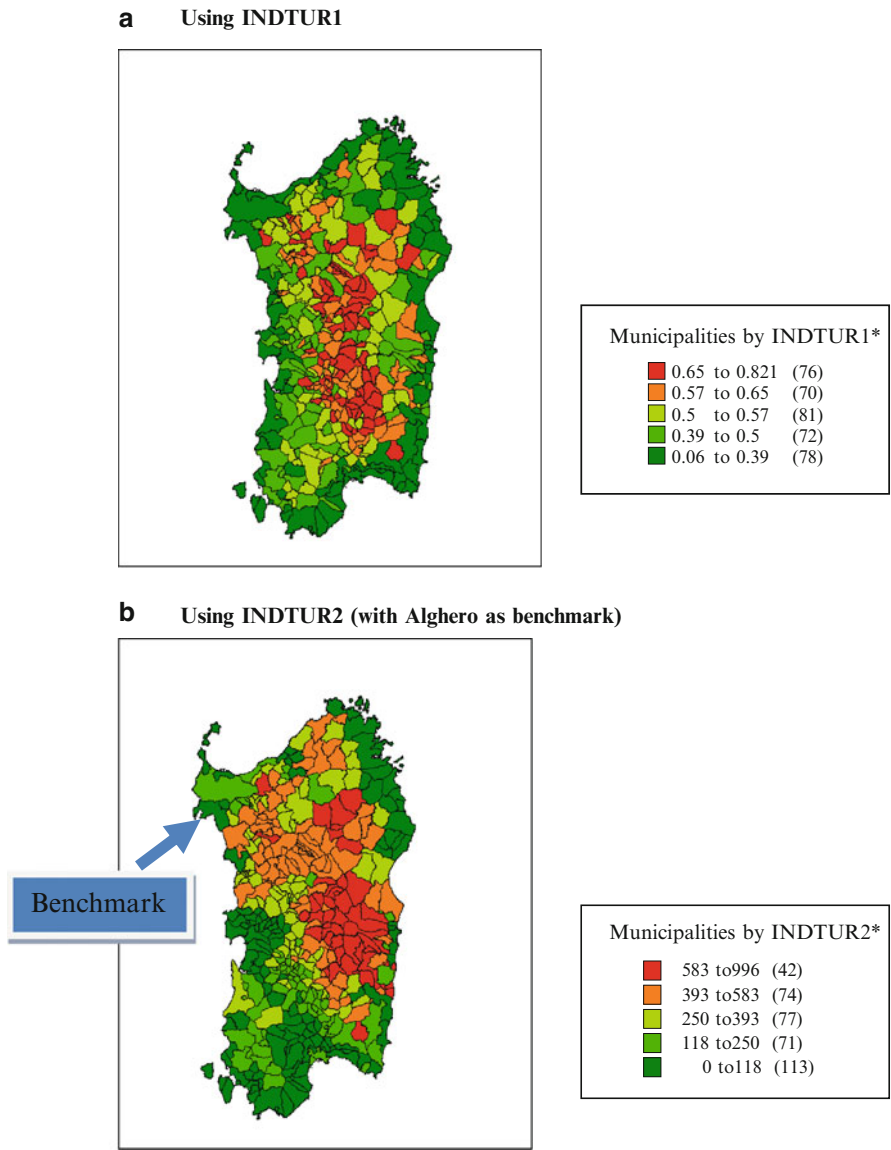


Fig. 36.2 Classification of Sardinian municipalities. (a) Using INDTUR1. (b) Using INDTUR2 (with Alghero as benchmark)

The index has a lower bound of zero, which represents the value of the benchmark. As for the case of the previous index, a lower value corresponds to a higher degree of tourism vocation. In the case of Sardinia, the municipality of Alghero¹² was chosen as a benchmark as it ranked first in all the tourist-related variables.

Figure 36.2a, b shows the results of the two indexes in the case of Sardinia. The most tourism-oriented municipalities have lower values while the least tourism-oriented have the highest.

¹²The role of Alghero as a top tourist destination is well known in Italy. In the 1950s, Alghero was also selected as the location of the first tourist association of Sardinia and the first Local Tourist Institution (Biagi and Contu 2002). Alghero has been also the first area in the Island to be promoted by an international tour operator in 1954: the Horizon Holidays.

The results of the two indexes are rather similar¹³ and highlight how the most tourist-oriented municipalities are located along the coast where the marine amenities are, even though this dichotomy between coastal-tourist versus central non-tourist municipalities is less sharp in Fig. 36.2b.

The Use of Tourism Indexes in Hedonic Modeling

The indexes described in the previous section, INDTUR1 and INDTUR2, were incorporated in a hedonic regression of type:

$$HR_i = f(S_i, E_i, QL_i, T_i) \quad (36.7)$$

with $i = 1, 2, \dots, 377$,

where: HR = housing market variable (housing rent)

S = vector of structural characteristics of the housing market

E = vector of economic and location characteristics of the municipality

QL = vector of quality-of-life variables at the municipality level

T = municipality tourist index

The function in Eq. 36.7 can be expressed using a variety of different forms. Not having any a priori reason to assume a different functional form, a simple linear functional form was chosen. Equation 36.7 therefore becomes:

$$HR_i = \alpha + \beta^{(k)} S_i^{(k)} + \gamma^{(m)} E_i^{(m)} + \delta^{(p)} E_i^{(p)} + \phi T_i + \varepsilon_i \quad (36.8)$$

with $i = 1, 2, \dots, 377$,

where: k = number of structural characteristics

m = number of economic and location characteristics of the municipality

p = number of quality-of-life variables

Notice that β , γ , and δ are vectors, and ϕ is a scalar, which gives us the effects of tourism on the housing market. We expect tourism to have a positive effect on the housing market, which means when recalling how tourist indexes have been built, we expect:

$$\frac{\partial HR_i}{\partial T_i} = \phi < 0$$

Housing rents are collected by private agencies at a more aggregated level than the municipality, so, following Glaeser et al. (2000), we used as dependent variable the average rents for 2001.¹⁴ Table 36.1 shows the list of the explanatory variables.

Table 36.2 presents the results of the final regression models. Model 1 does not include any tourism index while Models 2 and 3 includes INDTUR1 and INDTUR2 respectively.

As expected, the average size of houses in the municipality (*surface*) and per-capita income (*income*) are positive and significant, while population density is significant but negative confirming that this is more of a proxy for congestion rather than agglomeration economies.

¹³The two indexes show a significant degree of correlation: the Pearson correlation between the two indexes is 0.509, significant at the 0.01 level (two-tailed).

¹⁴The data were made available by CRiMM, (Research Center of the Engineering Department of the University of Cagliari, Italy).

Table 36.1 Definition of explanatory variables

Variable name	Definition	Type of variable	Source
Surface	Average surface of houses (square meters)	S	ISTAT (1991)
Income	Income per inhabitant (Euros)	E	Tagliacarne Institute (1994)
Density	Population density	E	Tagliacarne Institute (2001)
Crime	Assault to institutional persons and their property (average 1994–1998)	QL	UNCEN – ANCI Sardegna
Province	Dummy variable = 1 if the municipality is the chief town of the province	E	Our elaboration
Rain	Yearly rainy days	QL	Istituto Agro Meteorologico della Sardegna
INDUTUR1/INDTUR2 variables	1. Local expenditure in recreation and culture	T	Istituto Tagliacarne (1999)
	2. Number of summer houses	T	ISTAT (1991)
	3. Total number of accommodations (hotels, campings, tourist villages)	T	ISTAT (2001)
	4. Location quotient of tourist sector	T	Istituto Tagliacarne (1999)
	5. Distance from the coast	T	Servizio Agrometeorologico Regionale per la Sardegna-SAR
	6. Altitude	T	ISTAT

Table 36.2 Regression analysis results – OLS (with robust standard errors)

	Model 1	Model 2	Model 3
Constant	–423.85** (–2.55)	–403.32** (–2.47)	–403.34** (–2.40)
Surface	2.90** (2.43)	2.97** (2.48)	2.83** (2.35)
Income	0.020** (2.50)	0.019** (2.43)	0.021** (2.67)
Density	–0.125** (–2.21)	–0.121** (–2.34)	–0.123** (–2.33)
Crime	7.669* (1.62)	5.475 (1.14)	7.238* (1.61)
Province	7.67 (0.37)	20.69 (0.39)	16.56 (0.31)
Rain	–8.870 (–1.25)	–9.72 (–1.36)	–12.31* (–1.78)
INDTUR1	–	–34.76** (–3.26)	–
INDTUR2	–	–	–0.027** (–2.95)
R^2	0.6481	0.6538	0.6535

Dependent variable: *Average Rental Value*

*significant at 10%; **significant at 5%

Once controlled for heterogeneity using robust standard errors, the coefficient of *province* is insignificant.¹⁵ The quality-of-life variables – rain and crime – show mixed results. Both tourism indexes are significant and with the expected negative sign, which confirms how tourism positively affects housing market – i.e., the lower the tourist index, the higher the tourist vocation of the place, and the higher housing prices, and vice versa. Furthermore, the indexes contribute to the overall significance of the model as shown by the increased value of the adjusted R^2 .

Despite tourism research recognizing the impact of tourism on house prices, at present the topic remains under-explored. This is due to the many difficulties in testing the relationship between the house market and tourism, starting from the definition of “tourism destination” itself. Tourism indexes can assist in defining tourism areas and have also the advantage of being suitable for inclusion in a hedonic modeling framework. Our empirical exercise for the case of Sardinia highlighted the potential of this line of research, but it is by no means without shortcomings. A more sophisticated analysis should include developments on at least four main grounds: testing non-linear functional forms, considering possible spatial effects arising from the proximity of tourist destinations, refining tourism indexes, and tackling possible endogeneity problems.

Holiday Homes and Local Housing Markets

In recent years, the number of second home owners in the developed world has been steadily increasing (Palmer and Mathel 2010). Holiday home ownership constitutes a substantial proportion of home ownership in tourist areas, even though new forms of resort property ownership have made it difficult to exactly define what is meant by “holiday second home owner” (Gill 2000). For the purposes of our chapter, we define holiday homes as a subset of privately owned second homes mainly used for seasonal and occasional holidays.

The impact of the expansion of holiday homes in tourist destinations is quite complex, and yet the literature exploring in depth the link between holiday homes and local housing markets is relatively scarce. This is partly due to the fact that data on second home ownership are often inconsistent. These inconsistencies mostly reflect differences in data collection methods linked to how questions about the purpose of additional owned properties are phrased (Belsky et al. 2006). It is for this reason that the impact of second homes on local housing markets is often inferred rather than analyzed. Impacts on host communities are typically classified as direct and indirect and grouped into economic, sociocultural, and environmental/ecological (Pearce 1989; Bull 1991; Ryan 1991). Moreover, the policy implications of these effects are extensive and include policies for housing development control, housing taxation regulations, and affordable housing provision.

Holiday Homes as a Source of External Demand in Local Housing Markets

The tourism literature identifies groups of “external” demand which “compete” with the local resident communities (and in some cases with each other) for land and housing in tourist destinations: these are seasonal tourists, holiday home/second home owners, retirees, and last but not

¹⁵While it was positive in a standard OLS.

least a service working population, attracted in the tourist area as a result of the employment opportunities generated directly or indirectly from recreation related services, catering for the tourist population. Various studies have provided different classifications in an attempt to examine in a systematic way different patterns of housing demand by competing actors in resort communities (Muller et al. 2008; Venturoni et al. 2005; Gill 2000; Sautter and Leisen 1999). These classifications take into consideration mainly patterns of tenure type (renters, owners), length of occupancy (seasonal, year round), type of housing demand (apartment, family and multi-family housing, mobile housing), housing location preferences, local amenities preferences, reasons of demand for housing in the area (lifestyle choices, recreational interests, employment opportunities), as well as an indicator of affluence or occupational status, which reflects to a certain extent financial resources available for housing (Muller et al. 2008). In this context, some studies place particular emphasis on the analysis of the ways the differential access to economic and political power of different agents/interest groups (both local and external) can influence the dynamics of the planning and housing development process of resort areas (Müller et al. 2004; Gill 2000).

The tourism literature recognizes that the increasing demand for holiday homes in tourism destinations puts pressure on local housing markets and is a source of conflict between tourists and permanent residents, as the latter eventually cannot keep up with constantly increasing property values and property taxes. Moreover, this “resort vs. community” tension (Gill 2000) is accentuated when the local population has a low income or when increasing demand is paired with limited supply of housing stock (Shucksmith 1983; Casado-Diaz 1999). In some cases, this effect on housing opportunities available locally may lead to the displacement and relocation of the most vulnerable segments of the local population (Marjavaara and Müller 2007).

The issue of house price inflation as a result of holiday home demand has been widely reported in the international tourism literature (Venturoni et al. 2005; Gallent and Tewdwr-Jones 2001; Marjavaara and Müller 2007). Empirical research focuses on the effects on mainly two groups: the local population and workers in the recreation industry and recreation-related sectors.

Effects on the Local Population: Affordability, Displacement, and Gentrification

Venturoni et al. (2005) report results for four mountain resort counties in northwest Colorado (USA), where they find that in 2004, house prices in the ski resorts examined, dominated by second homes, were five and in some cases ten times higher than standard US home market values. They also report that for the period 1998–2004, the rate of increase of these values has been three to four times higher than that of the standard US city. These findings, paired with limited land for housing development (due to the physical geography of the areas under study) which restricts the potential for development, and the parallel constant sharp increase in second home ownership levels, has led to shortages of affordable housing in the area.

Gallent and Tewdwr-Jones (2001) discuss the “exclusionary” impacts of the phenomenon of second homes in the UK, with particular reference to Wales, where by the 1970s, the substantial rise in second home demand started influencing the ability of other groups to compete in the local housing market. In this context, they view second home owners as “potential harbingers to social exclusion” (Gallent and Tewdwr-Jones 2001, p. 59).

In the case of Sweden, Marjavaara and Müller (2007) note a significant increase in second homes in the period 1991–2001 in rural locations (mainly in southern coastal areas of the country). In the period examined, rural depopulation provided the housing stock for second home tourism, where former permanent residences were converted into second homes. The authors note that, despite the strong presence of the welfare state in the country and the development of

second homes sponsored by the state (social tourism) mainly in the 1970s, in more recent years, recreation “hot spot” areas have seen a big increase in property values, as result of exploitation pressures. In the estimation of the main drivers of these increases, they find that the presence of a large number of second homes, together with preferences/tastes of second homeowners for specific location amenities, can explain high increases in assessed property values in rural tourist destinations in Sweden.

For the case of Ireland, Fitz Gerald (2005) uses 2002 Census Data on second housing stock and reports rapid growth in the number of second dwellings in recent years in the country (since the mid-1990s), particularly prominent in the BMW region.¹⁶ High demand for dwellings for investment or holiday purposes has had a very significant impact on the cost of housing in the affected regions, with adverse effects on regional policy goals. In particular, the author goes on to examine the additional upward pressure on property prices as a result of holiday homes remaining vacant for a long period of time and not being available to permanently house independent households. In this context, the author notes that from the moment the increased stock of dwellings is absorbed as second dwellings, there are fewer dwellings available to meet the rise in the number of households needing permanent accommodation, driven by changing demographics. Similarly, in Fitz Gerald et al. (2003), always in the context of Ireland, it is clearly stated that: “(...) *the uncontrolled expansion of the second dwelling market is eating up resources, raising house prices, and militating against balanced regional development. Such dwellings should pay the full infrastructural costs that they impose on society*” (Fitz Gerald et al. 2003, p. 251).¹⁷

Big increases in the numbers of second homes in local housing markets can be seen as a form of gentrification. When vacant or derelict housing gets renovated and put back into the market at prohibiting prices, local residents are displaced due to affordability issues and communities experience radical social reconfiguration which is very similar to gentrification processes in urban neighborhoods. This relevance becomes apparent especially when housing and commercial developers start capitalizing on opportunities available in tourism destinations. Gotham (2005), in describing the results of socio-spatial changes of View Carre, the French Quarter of New Orleans (US), uses the term of “tourism gentrification” (p. 1102) to explain the change of the neighborhood from a middle-class population into an affluent enclave, as the result of *flows of capital in real estate market combined with the shift to tourism* (p. 1100). The construction of tourism-related buildings (a domed stadium, a festival mall and a theme park) and the organization of some mega-events have been the main strategy to generate urban revitalization that resulted in the influx of affluent population in the neighborhood and consequently its gentrification, and the third way of gentrification of affluent population.

Effects on Employees in the Recreations Sector: Housing Affordability

Increased demand for holiday homes and recreation services in tourist areas leads to increased demand for affordable housing for the accommodation of those working in recreation-related services, and the construction and maintenance sectors. As a result, the discussion of land and housing availability and affordability issues in the literature expands to include also effects on this population group attracted in tourism areas, not for recreation but for employment purposes.

¹⁶BMW stands for Borders with Northern Ireland, Midlands, and the West.

¹⁷Similarly, in the context of the USA, Di et al. (2001) discuss how the share of second homes in the total housing stock of individual US counties results in differential impacts upon various housing markets.

In this context, Lindberg and Johnson (1997) try to evaluate the social impacts of tourism in Oregon, USA; they note that tourism appears to contribute to the lack of low-income housing by increasing housing costs, and by attracting migrant workers who remain underemployed (or in some cases unemployed) and who are eventually added to the list of those in need of affordable housing. Murphy (1985, p. 99) describes a similar situation during the development of Disney World in Florida. Venturoni et al. (2005) talk about the consequences for employees, when second homes take up large amounts of land in mountain resorts of Colorado, where developable land is in short supply. They discuss the policy implications arising when the second home “industry” is simultaneously creating the need for more workers, and causing local property values to rise beyond the affordability threshold of this population group, making it impossible for them to live within reasonable distance from their place of work.

Supply Side Constraints

The above discussion highlights that the demand for holiday homes constitutes an external source of competition within local housing markets, which leads to the formation of what Rogers (1977) called “importing” and “exporting” leisure regions, where prosperous groups from the former, with an economic advantage, satisfy their desire to purchase second homes in the so-called “importing regions” (either for use or for investment purposes), where house prices and real incomes are lower. In this context, the type of demand (external demand) generated by second homes alters local market structures, making it more profitable for housing developers to supply not only more housing, but also more expensive housing (Gallent and Tewdwr-Jones 2001; Hettinger 2005).

The demand for second homes in tourism destinations leads to even higher inflationary pressures in local housing markets, when it is combined with supply side constraints. The latter can be linked to land and housing shortages due to geographical (physical) constraints of land available for development in tourism destinations (i.e., mountainsides, island locations, coastal areas, lakeshores), but also to planning and growth control regulations.

Tourism destinations with natural (and not man-made) attractions often have a set of rules and regulations put in place in order to protect their natural settings. These can be viewed as restrictions imposed in the free functioning of the local housing market of the tourist area. Restrictions can be on the type, design, and size (both in terms of height and surface covered) of dwellings, the standards for construction, and conversion/refurbishment, but also land use and zoning regulations that remove potentially developable land from the market. Housing literature looking at the effects of regulations on the housing market (Katz and Rosen 1987; Pendall 2000; Nelson et al. 2002) suggests that restrictions will increase housing production costs and consequently lead to the production of more expensive housing units, hence reducing the supply of housing at the “lower end of the cost scale.”

In the same context, Hettinger (2005) describes different processes through which different planning regulations can push prices up and lead to affordability problems for tourism communities. He explains how land use and zoning regulations add costs to the development process, leading developers to choose the construction of expensive units. As a result, affordable housing development becomes limited or ceases completely, leading to a housing crisis for the community. Hettinger also notes that when growth management regulations are imposed in a community to control possible adverse effects of excessive development, the community’s desirability as a place to live increases, leading to increase in housing demand. Since supply is limited, house prices increase in the community, leading again to affordability problems.

Policy Implications of Second Homes

Recreational second homes create a dilemma for local communities as they bring both benefits and costs. The policy debate has mainly focused on the role that planning can play in balancing the opportunities arising from the tourist housing market, with the costs imposed to local communities. Other relevant policies such as taxation or housing policies seem to be less effective in doing so. As Gallent and Tewdwr-Jones mention in their much quoted paper (Gallent and Tewdwr-Jones 2001), housing policies do not often have a direct or restrictive capacity in relation to second homes; taxation policies that have a primary aim to increase the cost of ownership are targeting second home owners the majority of which are affluent. Consequently, the majority of tax increases are not enough to counterbalance the potential investment returns from strong inflationary pressures in the property market.

Focusing on planning responses to concerns stemming from the increase in second home demand, Gallent and Tewdwr-Jones (2001) explain that the discussion on planning regulations mainly revolves around occupancy controls of new housing units, and ways to restrict the number of existing dwellings converted into second homes. Coppock (1977) underlines that any debate on planning regulations aiming to control the effects of second homes can be double edged since *“even tight planning control cannot avoid the social frictions which acquisitions of existing properties create”* (Coppock 1977, p. 11).

Mihaljek (2005) gives evidence on various European countries and occupancy controls, such as the case of Denmark where foreigners are free to buy real estate for business and primary residence purposes (subject to certain residency restrictions), but not as secondary homes. In particular, foreigners cannot own holiday homes along the Danish coast (such properties can only be rented out, p. 9). In the case of Malta, foreigner buyers can only buy one secondary home, and they have restrictions on the size and value of the property (limited size and value of property above a certain limit). The rationale for these restrictions is to retain a measure of control on land use and to prevent speculation. Foreigners could acquire additional property in Malta beyond the secondary residence only if they obtained Maltese nationality. For the Maltese government, letting the market completely free would affect property price creating a negative social impact via the reduction of affordability of housing for residents (mainly young couples and first time buyers).

However, the relevant literature also underlines possible problems that can arise from extreme measures aiming at suppressing second home demand. Paris (2009) notes that the imposition of very tight planning controls can cause even bigger problems for lower-income locals to find a place to live, from the moment that the latter have to compete with second home owners and landlords, and owners of holiday rental accommodation, in a housing market often restricted by planning.¹⁸ Similarly, Gallent and Tewdwr-Jones (2001) explain possible problems that can arise from the over-regulation of the demand for second homes, mainly linked with disinvestment in the rural property market and problems of residential segregation of lower income groups in specific locations. Moreover, they underline the importance of tailoring policies to local circumstances, pointing out possible threats that “bans” on second homes can pose to local housing markets that are otherwise stagnant (i.e., second homes’ potential owners being the only source of demand for housing and local amenities). In a similar context, Paris (2009) notes that the impact of different planning regulations can vary depending on cultural attitudes to development and also on the extent of social distribution of second home ownership: *“Some of the sharpest conflicts occur where a restrictive planning or regulatory system imposes strong constraints on development, thus once any local surplus of housing left over as a result of rural restructuring*

¹⁸In such cases, Paris notes that “there is a clear causal relationship between the growth of second home ownership and problems of affordability for lower-income households and first-time buyers.”

has been absorbed, any further growth of second home ownership can only occur through the purchase of existing dwellings whether for use, or replacement through redevelopment.”

Finally, the literature also points out that, despite evidence of the effect of second homes on housing affordability, the regulation of second homes should be incorporated into wider affordability debates in the context of national housing policies (Gallent and Tewdwr-Jones 2001; Mihaljek 2005). In this context, Mihaljek (2005), when looking at relevant issues in the case of Croatia, mentions: “(...) *one should not jump to the conclusion that housing would become more affordable if foreign ownership of real estate was more restricted. Housing affordability depends on many factors that have no connection to demand for vacation homes by non-residents. Two factors that are examined here are housing finance and public housing policy*” (p. 20).

Conclusion

After reviewing the literature on the relationship between tourism and the housing market, some conclusions are in order.

First, in order to explore the relationship between tourism and the housing market, we have classified the existing literature into two main research streams: (1) the hedonic studies coming mainly from housing economics literature that focus on the “composite nature” of the tourism product and attempt to quantify the impact of tourism-related amenities on housing price in resort destinations; (2) holiday second home demand on local housing markets of tourist destinations. This second strand of research has at its core the notion of inseparability/spatial fixity, or in pure economic terms the non-tradable nature of the tourism product: the “tourism good” as a basket of goods and services (including accommodation) is consumed (mainly) at the same location it is produced: tourists (external demand) compete with local residents for spatially fixed goods and services. The attention has been focused mainly of literature investigating the effects on housing affordability, displacement, and gentrification and policy responses mainly in terms of planning, aiming to balance cost and benefits for local residents in resort communities.

A review of both the theoretical and empirical literature on the first group of studies (hedonics) finds that the presence and the quality of local amenities positively affect house prices. More research efforts should be done in the direction of analyzing the effects of tourism as a whole using a tourism composite index into the hedonic housing price function.

A combined look of these two strands of research suggests that while, on one side, tourism is important for local economic growth, on the other, there is a delicate environmental and social equilibrium in tourist destinations which can easily be upset. In other words, from a strict economic point of view, the higher value of housing in tourism destinations can be seen as a positive signal of tourism-related local growth and the presence of natural or man-made amenities. However, in order to correctly evaluate the net overall benefits of the resource allocation in the tourism sector, it is essential to determine *who benefits* and *who pays* (Pearce 1989) in each phase of the life cycle of local tourism development (Butler 1980). Problems may arise when the pressure on housing prices is such that it creates serious social effects in terms of affordability, displacement, and gentrification. Moreover, peculiarities of most resort destinations (physical/geographical and regulatory) can make these pressures even stronger.

With these in mind, we suggest that future work needs to look more at market driven processes of change of housing demand and supply in tourism destinations. Moreover, future research should concentrate in analyzing housing demand and supply interactions as well as planning and policy responses in all phases of the life cycle of the tourism product, as these are identified in the traditional tourism literature (discovery, exploration, launch, stagnation saturation or further development).

The tourism economics literature should also investigate more in depth the impact of the tourism sector as a whole on house prices, i.e., using a composite tourism index rather than individual tourism-related amenities. The literature on second homes should focus more specifically on the link between second home markets and the housing market as a whole, mainly in terms of cross elasticities of demand and income elasticities.

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Chapter 37

Resident Quality-of-Life in Gaming Communities

Patricia A. Stokowski and Minkyung Park

Introduction

Communities typically support the development of casino gaming (or other types of tourism attractions) with both short- and long-term goals in mind. Specific goals may include “growing” job opportunities, increasing local revenues, updating local infrastructure, and renewing a community’s image. Broad, overarching goals usually relate to improving the local quality-of-life for citizens, businesses, and leaders. Though it is not always clear how a tourism development might specifically improve quality-of-life in a gaming tourism place, a community’s focus on quality-of-life serves the populace symbolically, linking divergent views about what the community is and what it can become, and offering a central idea around which the future can be envisioned.

Research about casino gaming places shows that the impacts of gaming development differentially affect residents – and the impacts themselves, along with residents’ perceptions of them, relate directly to people’s sense of well-being and the quality of their lives. Considered to be an aggregate, overall assessment of personal or collective well-being, the concept of “quality-of-life” has both objective as well as subjective dimensions (Marans 2003; Roehl 1999). Objective indicators of community quality-of-life (availability of good jobs, presence of recreation and amenity sites, increase in services, acceptable cost of living, low crime rate, good schools) are often measured quantitatively, and are linked with subjective indicators on personal and social levels (feeling satisfied with one’s life, judging a city as a desirable place to live, perceiving neighbors to be friendly, feeling positive, healthy, hopeful or safe, and experiencing a place as safe), as well as to a person’s social status. Because quality-of-life is not measured directly, though, the relationships between objective and subjective measures are not always clear. The types and physical distribution of casino-based recreation opportunities, and the ways in which the industry was introduced in a community and grew over time, are all factors important in understanding residents’ quality-of-life in gaming places.

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The term “gaming communities” refers to communities that host casino gambling venues, but casino developments may differ significantly in form. Some communities have entire blocks of their commercial zone given over to casinos (Central City, Black Hawk, and Cripple Creek in Colorado), while others have only a single land-based or riverboat casino (more common in urban areas). Some state legislation limits the size of casinos by specifying an allowable numbers of devices (Deadwood, South Dakota), while others do not. Any effort to compare resident quality-of-life in gaming communities must necessarily take into consideration the special qualities of each setting, and the legal boundaries set by the state in approving the industry.

Quality-of-life research is meaningful not only for developing an appreciation of individual and community well-being but also for informing public policy agendas. Measuring public perceptions of, and attitudes about, important aspects of social life, the changeable conditions of natural and built environments, and the appeal of places where people live, work, and play can provide policymakers with data about how communities change over time, and options to consider in working toward future goals.

The Context for Quality-of-Life Studies in Gaming Places

Though people have engaged in public and private gambling activity in all historic periods, gambling was first legalized and licensed in the USA in 1931 in Las Vegas, Nevada. Fears about linkages between gambling and organized crime, though, limited the spread of casinos further across the country for almost another half century. Then in 1978, Atlantic City, NJ, approved the establishment of licensed, privately operated casinos as a mechanism for revitalizing its economy. A renewal of interest in gaming occurred during the 1980s, as other states began to recognize the revenue-providing possibilities of legalized gambling (Shapiro 1996). Also during that time, federal approval of the 1988 Indian Gaming Regulatory Act allowed tribes to operate games of chance on reservations in states that had approved gaming; by 2008, Native American casinos operated in 30 states (American Gaming Association 2009).

Shortly thereafter, casino gaming was approved in several rural places, with community-based casinos opening in 1989 in Deadwood, South Dakota, and in 1991 in three Colorado towns – Black Hawk, Central City, and Cripple Creek. Riverboat gambling was also initiated in Midwestern states, including Iowa (the first state with legalized riverboat gambling, in 1989), Missouri, Illinois, Indiana, Louisiana, and Mississippi, in other states along the Gulf Coast, and near other major waterways. Casinos were also later legalized in New Orleans, Detroit, and Chicago, and by 2008, a total of 38 states operated legalized slot machine gaming and 12 states operated full commercial casinos (American Gaming Association 2009).

Public and government interest in gaming development has stimulated considerable academic attention, raising questions about the personal, social, and economic impacts of this form of recreation activity and community tourism development project. Many of the studies related to quality-of-life issues in gaming places have focused on casino gaming specifically, and two types of studies have prevailed: survey research about resident perceptions of, and support for, new casino developments, and analyses of the social and economic impacts of casino gaming in host communities. Though much of the research about casino gaming and its impacts has relevance for quality-of-life analyses, not all researchers have directly framed their studies in terms of quality-of-life issues. Nevertheless, the implications of their studies for community quality-of-life should not be dismissed.

Research about quality-of-life has applied methods and theories that are typically used in general assessments of tourism impacts and community development. Subjective measures associated with quality-of-life research in gaming communities include analyses of residents’

perceptions of casinos, of tourism generally, and of development impacts (including perceptions of changes in economic and social conditions that are seen to be related to personal well-being and local standards of living). Quantitative, objective measures aim to assess the direct impacts of casino gaming development (such as changes in crime levels, new job growth, infrastructure development, increases in community revenues, and so on) and evaluate how these impacts affect residential quality-of-life. While many kinds of impacts have been studied in gaming communities, a review of literature shows that one particular type of impact – the nature of actual and perceived crime, and its relation to resident quality-of-life – has received considerable attention, likely due to its important personal, public, and political implications.

The remainder of this chapter addresses each of the three topics noted above: resident perceptions of impacts, direct assessment of impacts, and crime as a special type of impact. An analysis of the research about resident quality-of-life in gaming communities, along with the contributions and issues associated with this area of scholarship, is offered at the end.

Residents' Perceptions of Quality-of-Life in Gaming Places

The scholarly literature of tourism exhibits a long tradition of research into residents' perceptions of tourism, tourism development, and quality-of-life in tourism places (Chon 1999). This research overlaps with traditions of scholarship in other fields, including psychology, geography, sociology, community development, and consumer behavior – disciplines that are also concerned with issues related to perceptions of social change in rural and urban places, the nature and strength of people's attachments to communities and to places, personal satisfaction with community services and institutional performance, collective support for growth initiatives, and entrepreneurial practices that support residents and stimulate tourism markets. In this wide-ranging literature, research about quality-of-life is often implicit, rather than explicit.

Research about residents' perceptions of quality-of-life in gaming communities has been conducted in a variety of tourism settings, including rural and urban places, communities with either large or small populations, American and international contexts, and places with different types of casino developments and gaming opportunities (Pizam and Pokela 1985; Perdue et al. 1995; Kang et al. 1996; Stokowski 1996a; Lew and Van Otten 1998; Hsu 1999; Roehl 1999; Lee et al. 2003, 2010).

In this research, perceived quality-of-life is conceived as an outcome of the anticipated or actually experienced impacts of tourism development, and associated with one's role in the community (local government official, "regular" citizen, local business person, gaming industry employee). These studies usually focus on one of two issues: (a) attempting to predict residents' attitudes toward anticipated future tourism developments and their associated potential community impacts (Pizam and Pokela 1985; Perdue et al. 1990), or (b) identifying residents' perceptions about existing tourism developments and tourists (Belisle and Hoy 1980; Caneday and Zeiger 1991; Haralambopoulos and Pizam 1996; King et al. 1993; Lankford 1996; Liu and Var 1986; Long et al. 1990; Milman and Pizam 1988; Pizam 1978).

When researchers have attempted to measure quality-of-life indicators in judging the extent of actual or perceived tourism impacts, the measures used have typically been indirect (Raento 2001). For example, using survey research, researchers may ask residents to indicate on attitude scales the level that best represents their personal feelings about specific kinds of impacts (changes in traffic volume, crowding, shopping opportunities, police protection, social services, and so on); trends in the data are assumed to be indicative of changes in perceived quality-of-life (Long 1996; Roehl 1999). Such indirect, aggregate approaches have tended to result in many sub-concepts associated with quality-of-life indicators, and studies using a variety of measurement units that may differ from case to case.

Beyond the issue of indirect measurement of the quality-of-life concept, another concern is that most of the research about residents' perceptions of quality-of-life in gaming communities involves psychological studies of individuals' perceptions, attitudes, and beliefs (that is, their internal cognitive functions), with little research explicitly using behavioral measures to confirm reports of personal cognitions. Observations of residents' behaviors and questions about changes in behaviors (e.g., whether residents do more or less local shopping, see or talk to neighbors more or less often, participate in community activities more or less regularly) could increase our understanding of the impacts of development in gaming communities, and may provide better cross-community measures of quality-of-life in gaming places.

Nevertheless, research shows that different groups of community residents often have quite divergent views about the impacts of gaming tourism. For example, business owners and tourism industry workers generally tend to be more supportive of growth activities than are other citizens, and the same is true for people who work in the casino industry (Perdue et al. 1990; Roehl 1999; Nichols et al. 2002a, b). While early studies have often been conducted using a segmentation approach, recent studies have attempted to apply theoretical frameworks to understand quality-of-life more systematically. For example, some studies have considered gaming development in relation to other "boomtowns" (Freudenburg 1982; Summers and Branch 1984), proposing that rapid growth related to gaming development creates significant social change, which is stressful for residents and local community institutions (Perdue et al. 1999; Park and Stokowski 2009).

Many studies of residents' perceptions of gaming community quality-of-life have been case studies, and comparative and longitudinal work remains a priority. Among studies that are comparative or longitudinal, results show that positive benefits derived from local casino development tend to contribute to positive future perceptions about the industry and the community's quality-of-life (Lee and Back 2003, 2006; Kang et al. 2008; Perdue et al. 1999). In their comparison of eight communities that had recently adopted gaming, Nichols et al. (2002b: 256) found that gaming had a relatively neutral effect on residents' perceived quality-of-life. But they also observed that, "the size of the casino relative to the community matters... introducing casino gambling in small communities with little or no tourism base, or building casinos on a large scale, has a greater impact on the overall quality of life, both positive and negative, than small-scale casinos or casinos in communities with an existing tourism base."

Impacts of Gaming Development Related to Community Quality-of-Life

Beyond research about residents' perceptions of development impacts in gaming communities, a wide array of studies have attempted to document and assess both tangible and intangible impacts (economic, social, environmental, cultural, and institutional) associated with community gaming development. The spread of recreational gambling opportunities across the United States over the past several decades has spurred awareness and interest in this topic by citizens, local leaders, and policymakers, all interested to learn the lessons that can be obtained from the experiences of other jurisdictions. As a result, scholarly papers and books have appeared with increasing frequency (see, e.g., a special issue of *The Annals of the American Academy of Political and Social Science* (1998); a special issue of the *Journal of Travel Research* (1996); books by Rubenstein 1984; Long et al. 1994; Goodman 1995; Stokowski 1996a; Lew and Van Otten 1998; Meyer-Arendt and Hartmann 1998; Hsu 1999; James (1999) for the Report of the National Gambling Impact Study Commission).

In general, research findings from this body of work have shown that benefits of gaming development tend to be economic, but the costs are social, cultural, and also economic. In addition, people with tangible personal or business interests in the new industry tend to be more

favorable to its expansion and less concerned about its impacts. Citizens unaffiliated with the industry vary in their support for legislation and gambling. For example, in a study of two Iowa riverboat communities, Hsu (1998) found that people whose highest level of education was a high school degree, who had supported riverboat gambling legislation, and who had visited the casino, perceived the impacts of the riverboat gaming developments more positively. But, many issues related to the nature, extent, and intensity of impacts remain unaddressed, and comparative, longitudinal studies in which the relationships between development impacts and quality-of-life are more clearly specified are needed.

The issues associated with community impacts of gaming offer a wide range of research questions and hypotheses for interested researchers. These research topics are multifaceted, as Raento (2001) observed in framing issues of gaming at the intersections of local history, geography, and multi-scale development of gaming and heritage industries. She noted (2001: 99) with reference to the gaming industry in three rural Colorado towns that, "The Rocky Mountain case exemplifies how local geographies interact over time with regional, national, and global processes and constantly shape the most intimate environments of routine and leisure. These local geographies are spaces where meaning and experience are created and contested." Further, as Gonzales et al. (2007: 405) noted in their study of gaming on Native American reservations in Arizona and New Mexico, gaming's positive and negative impacts are "filtered through a myriad of structural and cultural contexts." Further research on such issues would contribute understanding and applications in the areas of community planning practice, and in design of livable communities that also feature sustainable economies.

Economic Impacts

Nickerson (1995: 63–64) notes that, "economics tops the list for why gaming should be instituted and why it should stay." Among studies of resident quality-of-life in gaming communities, critiques and analyses of the local and regional economic impacts of gaming tourism are most prominent. Indeed, since developers and promoters acclaim the potential of gaming development to provide new jobs, raise personal incomes, stimulate regional business development, improve tax revenues, and in general, "grow economies," it is natural that researchers have focused much of their attention on this topic (Eadington 1976). Stitt (2001: 158) reminds scholars, however, that "the impact of the casino varies by community...it appears that there is no single casino effect." That is, effects of gaming development on quality-of-life vary by setting, by type of impact and nature of development, and by general community factors (population, existing economic base, diversity of the local and regional tourism base, and so on).

Rephann et al. (1997) studied 68 counties that had adopted casino gaming between 1989 and 1993, evaluating various indicators of economic growth, and comparing the gaming counties with others that had not adopted casino gaming. Direct as well as indirect economic benefits resulted from the development of recreational gaming opportunities. Casino counties that had been economically depressed before gaming was introduced experienced increases in available jobs, and new income was associated with service sector jobs, retail trade, and construction. Per capita income also increased, though communities suffered leakage effects when employees living outside the county were hired to fill local jobs.

On the general assumption that "a rising tide lifts all boats," most studies of the economic benefits of gaming development assume that residents' quality-of-life also increases when the community's overall economic circumstances improve. The success of a tourism growth strategy, however, should be gauged by how well the needs of all community members are served, not only by the aggregated wealth accumulated, which may not be equitably distributed.

Social and Institutional Impacts

Tourism development does transform host communities, but it is not always clear how gaming tourism compares with other forms of modernization as an agent of social change. Some studies of the social, cultural, and institutional effects of tourism development have challenged the received notion of widespread economic benefits with few associated costs. In particular, residents become negatively affected by economic leakage, and social, political, cultural, and environmental impacts of gaming development (Stokowski 1996a, 2004). Because social, political, and cultural impacts are difficult to measure, many studies of these impacts use qualitative approaches, and some longitudinal case studies are available (Stokowski 1996a, 2011). But, these types of studies are less focused on quantifying variables, and are typically unable to make comparisons across jurisdictions and cases.

Clearly, impacts will vary by the scope and scale of a community's gaming enterprise, but a pattern observed across many new gaming locales relates to Butler's (1980) destination life cycle model: it shows an exaggerated and pronounced upward slope at early stages of gaming development. Yet, many communities (especially rural places) are unprepared for the rapid pace of local change or the single-minded focus of highly sophisticated gaming entrepreneurs (often external owners who have few ties to the local community) seeking early entry into new markets.

Commitment to effective planning processes is thus a key aspect of making community decisions about pursuing and adopting gaming development strategies. Traditional approaches to planning assume that benevolent public leaders will guide and manage a rational, data-based, futures-looking, participatory planning process. The fallacy of this model is illustrated by the evidence of growth machine politics (Stokowski 1996a) that have accompanied gaming development. That is, local leaders and business persons often have a vested interest in promoting and accommodating the new industry, as they are likely to profit most – but this is often in conflict with the perspectives of local citizens, who are often more conservative in their opinions and cautious about how gaming development should proceed. Some gaming places have relied on expert planning assistance in crafting the new industry, but as Chadbourne et al. (1997: 51) observed, tensions remains, for “casinos are not interested in an elongated public review process. Time is money.”

There are numerous studies that seek to identify characteristics and market segments of gamblers frequenting casino locales, but remarkably few analyses of several other topics that are common in the academic tourism literature: host/guest encounters, authenticity and interpretation of local heritage, and destination image and marketing. Additionally, few studies of the impacts of gaming tourism on residents' quality-of-life have incorporated assessments of environmental impacts – either as related to effects on natural landscapes or to built environments. Impacts on historic and cultural resources and artifacts have received some limited attention (Chadbourne et al. 1997), since the quality of the architecture in gaming communities of the western part of the USA has been (at least in concept) central to authorization of casinos in former mining towns.

These issues are at the heart of a community's sense of place, and how such issues are addressed and managed during development processes reflects and contributes to residents' social cohesion, their abilities to identify meaningful aspects of local life, and their skills in influencing planning processes. Stokowski's (1996a) analysis of the introduction of casino gaming in Colorado mining towns, and other studies of gaming development in historic communities (Long 1996; Chadbourne et al. 1997), indicate that strong political will is needed to protect significant local places, to apply consistent design and architectural guidelines, and to plan effectively in the face of corporate pressure.

One study aimed at understanding community well-being over time in a gaming locale and using documentary sources is Stokowski's (2011) semiotic analysis of local newspaper photographs.

Asking whether public documents might reflect and create symbolic meanings associated with gaming development and its impacts, the author analyzed trends in the content of news photographs published over two decades on the front page of the local newspaper in two Colorado gaming towns. The study showed that the numbers of all published photographs, along with photographs with people, and photographs with smiling people, decreased across the years of gaming development, while space devoted to “news” increased. The decline in numbers of smile photographs was also associated with more pictures of local government activities, symbolizing the blurring of interests between local government and the casino industry. Stokowski suggested that monitoring the uses of community images, symbols, and myths that are expressed in cultural artifacts such as news photographs can help identify meaningful aspects of local quality-of-life and its implications during various stages of tourism development processes.

Crime and Quality-of-Life: A Special Issue in Gaming Development

With respect to analyzing residents’ quality-of-life in gaming communities, no topic has received more attention than that of crime. Public concern about gaming often arises from fears about the connections between gambling behavior and gaming operations, and organized crime and corruption. As gaming developments have spread across America over the last several decades, casinos have also been blamed for causing increases in local street crime (Dunlap and Laxalt 1982; Ochrym 1988). In the research about crime impacts of gaming, however, it is not always clear whether increases in crime result from more opportunities for people to engage in criminal behavior, or whether these result from increased oversight and enforcement by larger numbers of police officers. Many towns that institute casino gaming also increase the size of their police force; this is especially true for smaller or more rural places that have, prior to gaming, limited resources to support public safety.

Following the opening of casinos in Atlantic City, NJ, many studies were conducted to investigate the effects of casino gaming on crime. Hakim and Friedman (1985) showed that all types of crime were higher in the Atlantic City region in the year after casinos opened, compared with pre-casino time periods – a result that also suggested crime spillover effects in distant communities that were not benefitting economically from establishment of casino gaming in Atlantic City. Similar results were obtained in subsequent studies: casino gaming brought more crime, and the effect remained even when other variables (unemployment, population, community wealth) were considered (Friedman et al. 1989; Hakim and Buck 1989). Increased regional crime levels related to casino gaming in Atlantic City also appeared to depress property values (Buck et al. 1991a, b).

Researchers have attempted to distinguish between casino-based crime effects and community crime more generally. For example, in his study of gaming impacts in Atlantic City, Albanese (1985) emphasized “the risk of being victimized” rather than the absolute increases in crime numbers. He proposed that crime statistics account for “changes in the population at risk, changes in criminal opportunities, changes in law enforcement resources and priorities, and changes in crime elsewhere in the State” (pp. 40–41). His research suggested that, once gaming had been introduced, the likelihood of being victimized in Atlantic City was somewhat reduced because average daily visitor populations had increased; as a result, the advent of casino gaming had no direct negative effect on crime. Similarly, in their study of casino-based crime in Atlantic City (crimes that occurred in a casino or a casino hotel), Curran and Scarpitti (1991) found that the standardized community crime rate (crime rate per 1,000 residents) occurring outside of casino property was similar to that of comparable cities. When the crime rate for Atlantic City was adjusted by combining the resident population and an average daily number of visitors, the standardized crime rate was reduced. The authors suggested that assessments of crime impacts in

gaming areas must adjust for the population at risk. Researchers should also assess whether new crimes had occurred primarily in casino areas, with casino patrons as the primary victims.

The effects of casino legalization on street crime in Atlantic City were studied by Ochrym (1988), who considered both the legalization of casinos, and tourism development, as distinct independent variables that could affect levels of street crime. One hypothesis to consider in gaming development is that legalization of gaming creates a “tourist environment” that is appealing to criminals because the chance of detection and arrest is reduced, since tourists may be less likely to report crimes. Ochrym concluded that both legalization of casinos and tourism development had effects on crime increases in Atlantic City. Hakim and Buck (1989) also asserted that gambling in Atlantic City, rather than growth in general, affected crime in communities. They studied “total assessed property value” to measure growth – an indicator that needs further elaboration because it may simply represent degrees of community wealth, not growth directly produced from gaming development.

Studying another casino jurisdiction, Stokowski (1996b) employed a longitudinal approach to evaluate the relationships between crime and gaming in Colorado’s rural gaming towns, tracing changes in reported crime levels prior to the gaming development, during the construction period, and after gaming’s establishment. Her research showed that gaming development led to increases in specific types of crimes. Gaming counties had notable increases in property crimes rather than violent crimes, and total arrests also increased over the course of the development (especially for driving under the influence of alcohol (DUI), simple assaults, disorderly conduct, forgery and fraud, narcotics and liquor violations). But, crime increases were not proportional to increases in the numbers of gamblers – though increases in crime placed new demands on local governments and affected resident’s perceptions of safety.

Several other studies also suggest that gaming development appears to attract specific types of crime. After gaming was introduced in Biloxi, MS (Giacopassi and Stitt 1993), economic crimes (larceny theft, motor vehicle theft, robbery, burglary, and fraud) and public order crimes (aggravated assault, disorderly conduct, drunkenness, trespass, and prostitution) increased. In Davenport, IA, arrests for driving under the influence of alcohol, and disorderly conduct, also increased after gaming was initiated (Ewart 1994). Noting that research could profit from more precise measurement of growth and comparative analysis, Park (2000) and Park and Stokowski (2009) applied social disruption theory to study crime in rural tourism communities, and developed more sophisticated growth indicators to compare tourism places with different growth levels. These authors found that high growth tourism communities experienced significantly more property crime than tourism communities with lower growth levels. Their study also suggested interactions between growth levels and different types of tourism places.

In the same study, Park (2000) and Park and Stokowski (2011) compared crime rates in gaming tourism places with crime rates in other types of tourism settings (ski resort places, communities that had significant access to natural resource amenities, and communities with cultural tourism attractions), finding differences in crime rates corresponding to the different types of tourism development. Total violent crimes and total arrests were not significantly different across the four types of tourism counties studied, but differences were found in total property crime. Contrary to common perceptions, though, the average crime rate for total property crime was significantly higher in ski resort counties than in casino gaming counties, even after controlling for such variables as police numbers, average traffic volume, time, and growth levels.

The increasing sophistication of research about crime impacts in gaming communities can provide scholars and policymakers with deeper understandings of the complex issues that affect residents’ quality-of-life. In tourism places – particularly those where large or extensive casino developments have been introduced – the volume of tourist traffic often increases at a rate faster than the growth of the residential population. Increased staffing of police forces in gaming places may mean increased police presence or vigilance – and so more crime reports may be filed

because more police officers make more arrests. In result, communities that have increased numbers of crimes may not actually experience the likelihood that more citizens will be victimized by crime. In addition, different stages of tourism development (project approval, construction, opening, early growth, reinvestment stages, and so on), in combination with the rapidity of tourism growth, may have differential effects on crime rates. The evolution of community tourism attractions will likely have implications for levels of community wealth, local social capital and neighborly interaction, and attractivity to criminals.

Nevertheless, public perceptions that gaming attracts more crime than other types of tourism development may have tangible consequences for communities seeking to initiate casino gaming developments. These kinds of tourism communities may feel compelled to invest more heavily in police and courts staffing, and in services and facilities to allay public fears about the potential for increased crime. Residents may feel unsafe, stressed, or unhappiness, leading to a sense that quality-of-life has been reduced. These concerns, and their associated costs, should be accounted for in the planning stages of tourism development, especially when high growth is expected to be a consequence of the tourism development type chosen by a community.

Analysis: Residents' Quality-of-Life in Gaming Communities

Research about residents' quality-of-life in gaming communities represents a special case of more general studies about individual and community quality-of-life in tourist destinations. Quantitative analyses of the economic benefits of gaming tourism development are common, but economic issues are not the only measure of community quality-of-life (though they are seen to be defensible, and are typically given high priority in policy applications). Emphasis on tangible economic impacts may also minimize attention to other types of impacts (social, environmental, cultural, political, and symbolic) that are more difficult to quantify. Yet, these issues are relevant to residents' experiences of community life, as well as to institutional processes of planning, management, and policymaking.

An emphasis on community quality-of-life extends gaming and gambling research beyond three topics common in this literature: (a) the motivations, behaviors, and characteristics of gamblers themselves, (b) questions about the nature and suitability of the gaming industry for locales, and its ability to stimulate community economic development, and (c) the entrepreneurial activities of the industry itself. Quality-of-life issues are especially concerned with changes in existing social, economic, and environmental conditions, and with future planning and mitigation of undesirable consequences that may occur as a result of casino gaming and tourism development. Existing research about residents' perceptions of gaming impacts, and specific measurable indicators (notably, economic well-being and crime impacts), provides a basis for understanding residents' quality-of-life in gaming communities, but further research is needed about several other issues discussed below.

First, the location of casinos, the types of gaming development, and the rate of growth of the casino industry in a community are all associated with different kinds and intensities of impacts, which are likely to differentially affect residents' perceptions of a community's quality-of-life. Some gaming venues are situated in downtown commercial zones, while others are located on a town's periphery; some places allow construction of only single casino, while others support multiple casinos; some casinos are large in size, while others are smaller; many casino gaming developments are accompanied by rapid local growth (first in construction; later in tourist visitation). The organization and structure of the gaming industry affects segments of the local and regional populations in varying ways, and studies of residents' quality-of-life should aim to account for structural differences in the gaming industry and regional quality-of-life effects.

Related to this is research about the relationships between gaming attractions and surrounding communities, a special case of which are casinos located on tribal lands (Carmichael 2000; Carmichael et al. 1996). One example of how representations of rural life were used in an effort to claim ownership over native lands and their uses was presented by d'Hauterter (2001), who studied the Foxwoods Casino resort in Connecticut. Regional impacts and quality-of-life indicators associated with tribal gaming development remains an understudied topic. Another topic that has recently been introduced in the literature on gaming impacts is that of social capital, which is linked positively with quality-of-life. Griswold and Nichols (2006: 369) found that "the presence of casino gambling significantly reduces social capital when a casino is located within 15 miles of a community," suggesting that planners and policymakers should carefully choose casino development sites with local and regional impacts in mind.

Second, social and economic conditions change over the life history of a gaming tourism development, and these changes may affect actual and perceived quality-of-life (Perdue et al. 1999; Stokowski 2011). For example, the local population structure changes as "old-timers" move away and newcomers move in (this may be especially important in places that have very small populations at the time gaming is introduced, for example, in rural communities somewhat distant from major metropolitan areas). Likewise, over time, turnover in local government administration and business leadership will occur. Communities often seem to become entirely new places, as changes in services, infrastructure, and government tax revenues affect local life. In addition, casino gaming development brings physical changes to local natural and built landscapes. How these kinds of social, political, and environmental transformations affect residential quality-of-life over time is a topic for future study. Longitudinal research, where quality-of-life measures are linked to community changes, is desirable.

Third, many different kinds of people (local residents, as well as tourists from outside the community) participate in a community's casino gaming development, and measurement only of adult residents' quality-of-life may obscure other issues relevant to the assessment of overall community quality-of-life. This may be true even if residents' perceptions are disaggregated by community role (residents, business owners, gaming industry employees, government officials), because there are other groups of people that are never accounted for in such analyses. For example, other groups of people (daily construction employees; the poor or disenfranchised; children; casino employees living outside the immediate community; external service social service and medical providers; people living in nearby communities whose commute takes them through the affected area; external consultants) use local services, interact with local residents, and are, at times, also impacted by tourism development processes. The public pronouncements and observable behaviors of these others may also impact residents' sense of place and perceptions of its qualities. Researchers should look beyond traditional categories of residents in assessing the effects of casinos on community quality-of-life.

Fourth, people involved in recreational gambling and casino-based leisure activities include community residents, not only tourists. Quality-of-life research in gaming communities typically asks whether and how often residents visit casinos, and there has been considerable research about the characteristics and behaviors of various market segments of gamblers (see Park et al. 2002, for an example), and about pathological gambling (Lesieur 1977; Korn and Shaffer 1999; Stitt et al. 2000; Volberg 2001). To what extent does participation in this recreation activity influence a gambler's personal sense of happiness and well-being, and how does that carry over into other behaviors, interactions, and relationships in their residential setting? Public policy issues should also consider issues related to community and personal health and gambling behaviors, and family functioning and well-being in gaming communities (Korn and Shaffer 1999).

Fifth, while many types of social, cultural, and political impacts arise in gaming tourism development projects, measurement is complex and case studies prevail. Many unanswered questions remain about the form, magnitude, potency, durability, or resilience of impacts over time – and the

consequence of these for residents' quality-of-life – in tourism settings. Longitudinal research is needed to move beyond merely documentation of the presence/absence of impacts, to determine how impacts are interconnected, and to assess their influence on community quality-of-life, locally and regionally. Researchers should also consider the individual and cumulative effects of impacts across the entire spectrum of planning and development – from initial announcement, to discussion, decision-making, construction periods, and operation (Stokowski 1993, 1996a) – since quality-of-life effects may occur at different stages. Further, comparative studies (Perdue et al. 1999; Lee and Back 2003; Park and Stokowski 2009, 2011) of gaming places and those comparing multiple types of tourism communities are needed to provide benchmarks against which future research findings can be assessed. Research to assess relationships between subjective and objective indicators of quality-of-life is also needed; do subjective indicators also show improvement when objective measures exhibit positive changes?

Finally, gaming is typically proposed by community leaders as a growth strategy intended to provide substantial growth and benefits (typically economic in nature) with few adverse impacts. This model of local boosterism is quite common, but what often goes unacknowledged is that the primary “boosters” are business persons and community government leaders, many of whom are ideally poised to gain personal advantage from a new development. Logan and Molotch (1987: 51) refer to this as the community's “growth machine,” managed by local elites who “use their growth consensus to eliminate any alternative vision of the purpose of local government or the meaning of community.” Residents often do not share the same adventurous spirit as local leaders, and are usually far more cautious in supporting new growth agendas (Madrigal 1995), as shown by Stokowski (1996a) in a study of two Colorado casino gaming towns (see also Stokowski 2011).

Support for this idea can also be found in research by Giacomassi et al. (1999), who interviewed community leaders (government, service, and business leaders) in seven new casino communities to determine their perceptions of gaming's impacts. Their results showed that a majority of local leaders supported the new gaming industry, believed that the casino contributed to a better quality of community life, and felt that the local economy had improved with the adoption of casino gambling locally. On the other hand, in a study about gaming in Korea, Lee et al. (2003) uncovered significant differences in residents' perceptions toward community quality-of-life before and after casino gaming development. Research on topics like growth machine politics can offer new ways of conceptualizing the impacts of gaming development and community quality-of-life.

Conclusions

Consideration of quality-of-life issues in gaming tourism development will bring to the forefront issues about personal and collective values, civic participation, institutional performance, local governance processes, and the preservation of valued social, cultural, and environmental qualities of casino communities. This research also has an applied focus and, in ideal circumstances, will inform public planning and policymaking in tourism communities. Schuessler and Fisher (1985) explain that the concept of quality-of-life is not simply an abstract idea, or one focused only on individual well-being or happiness. Nor is the concept ethically neutral, as research about quality-of-life is concerned ultimately with “the desired outcomes of social policies and programs” (p. 129). Thus, the results of research about resident and community quality-of-life in casino gaming places can ultimately contribute to public policy discussions about balancing economic and social goals in creating communities that are both desirable places to live and also productive places to conduct the business of tourism.

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Part IV

Epilogue

Chapter 38

The Missing Links and Future Research Directions

Muzaffer Uysal, M. Joseph Sirgy, and Richard R. Perdue

Introduction

Much of tourism takes place in destinations, and people travel to destinations to visit attractions to meet their intrinsic and extrinsic growth needs, participate in leisure activities, and enrich themselves with experiences preserved in memories and external forms for years into the future. Over time, destinations also change, and the level and rate of change consequently affect the nature of their appeal and the extent to which they benefit from tourism activities.

To fully understand the issues that surround the links between tourism and quality-of-life (QOL) of both tourists and residents, we need to examine tourism from a systems point of view with two nested models of tourism impacts, one model examining the effect of tourism on the QOL of individual tourists and the second model examining the effect of tourism on the QOL of residents. The focus of the first model is to examine and understand the impact of tourist-related variables on the well-being of tourists. Well-being of tourists can be viewed in terms of subjective and objective well-being. Subjective well-being deals with tourists' overall sense of well-being which may be captured through a variety of concepts such as life satisfaction, perceived QOL, life domain satisfaction (i.e., satisfaction in leisure life, social life, family life, work life, etc.), positive/negative affect, and overall happiness. Objective well-being refers to actual value-laden circumstances related to tourists' life domains (objective indicators of wellness in a variety of life domains such as leisure life, social life, cultural life, work life, family life, love life, travel life, culinary life, and spiritual life, etc.).

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The focus of the second model is to examine and understand the impact of tourism-related variables on the well-being of residents of the host community. Well-being of community residents can also be viewed in terms of subjective and objective well-being. Subjective well-being deals with residents' overall sense of well-being that can be captured through a variety of concepts such as life satisfaction, perceived QOL, life domain satisfaction (i.e., satisfaction in leisure life, social life, family life, work life, etc.), positive/negative affect, and overall happiness. Objective well-being refers to the actual circumstances related to residents' economic well-being, social well-being, environmental well-being, and health well-being (Sirgy 2001, 2010).

The elements of the fully functioning tourism system are a prerequisite for identifying and understanding the tangible and intangible benefits of tourism, allocating limited resources and developing appropriate destination marketing and management actions to maintain a sustainable tourism system and a competitive edge in the market place while attaining a set of desired QOL goals. Several scholars have proposed models of the tourism system (Gunn 1988; Leiper 1979; Mill and Morrison 1985). However, the essence of all those models is that the tourism system consists of an origin and a destination. An origin represents the demand side of tourism, the source of visitors. A destination, on the other hand, refers to the supply side of tourism, part of the system with drawing power – tourism activities meeting the needs of visitors and creating a total vacation experience (Uysal 1998). Tourists, service providers, and tourism attractions, DMOs as stakeholders are the central components of the system. The transportation and information (marketing) components are “linkages” (both physical and digital) that enable the tourist to decide where to go, how long to stay, and what to do. These linkages, however, also enable the industry through promotion, product development, and pricing strategies to directly affect the decisions of prospective customers (Fesenmaier and Uysal 1990; Sirakaya and Woodside 2005). The interaction between demand and supply is reciprocal, and such interaction affects the creation of a total vacation experience in which the simultaneous production and consumption of goods and services take place.

The amount and quality of time spent at a destination affect one's quality of vacation experience and service encounters. The very existence of tourism and sustained competitiveness depends on the availability of resources and the degree to which these resources are bundled to meet visitor expectations and needs at the destination (Uysal et al. 2011; Kozak 2004). The resources that typically attract tourists are numerous and varied in distribution and degree of development, and in the extent that they are known to the tourist market (Pearce 1987). The degree of this interaction between visitors and the visited, the level of tourism development in the destination community and availability of tourism amenities, support from stakeholders, and consumption life cycle all affect the perceived and realized benefits of tourism, thus affecting the QOL of tourists and residents.

To establish the missing links between tourism research and QOL, the general approach we took in this handbook is that intangible and tangible benefits from tourism activities need to be examined both from the perspectives of tourists and community residents. Implicit in this perspective is the notion that those tourists as guests and locals as hosts also interact actively or passively. These interactions also cover the impact of tourism organizational variables on the well-being of employees. These interactions can also be a source of satisfaction or dissonance for both the guest and host. Although there has been a significant amount of tourism research by sociologists and anthropologists examining the sociocultural impact of the host-guest relationships (Smith 1989), there has been, if any, very limited research on the effect of such interactions on the QOL of guests, hosts, and employees of service providers. We as tourism researchers are challenged to examine the extent to which how these interactions may also positively or negatively influence the subjective and objective well-being of tourists and community residents.

Tourists interact with other individuals, groups, and residents of the host community. These interactions can take place at any point of the different phases of a travel experience, ranging from planning and anticipation, travel to site, onsite, and return home. The nature of these

interactions in individual or group settings affects the well-being of travelers directly or indirectly (Neal et al. 1999, 2004, 2007; Dann 2001; Hallab et al. 2003; Richards 1999; Sirgy 2010; Sirgy et al. 2011). Most tourist leisure activities help tourists rejuvenate and get rid of stress. Furthermore, the tourist experience has the potential to induce positive feelings such as happiness (Gilbert and Abdullah 2004). The chapter on “Relationships and the Tourism Experience: Challenges for Quality-of-Life Assessments” by Philip L. Pearce reviews the influences of a variety of relationships, the tourism contexts in which they occur, and the role of these interactions on the well-being of travelers. He articulates some of the QOL implications such as reducing stress, fostering identity, adding to skills and character strengths, and building an emotional preparedness to be receptive to others. The chapter titled “Positive Psychology and Tourism” by Sebastian Filep also provides three linkages from positive psychology to tourism: fulfilling happy tourist experiences, embellishing global tourism education values based on positive psychology character strengths, and humor and its value in promoting a productive workforce. These linkages collectively help explain optimal human functioning, resulting in happier and more satisfied potential employees of tourism.

As we conduct research in tourism and QOL, we should also explore possible research tools and methods from different fields and disciplines. The chapter on “The Role of Qualitative Methods in Tourism QOL Research: A Critique and Future Agenda,” coauthored by Vincent P. Magnini, John B. Ford, and Michael S. LaTour, describes three qualitative techniques: photo-elicitation interviews, childhood memory elicitation, and sentence completion task that hold promise for future research in tourism and QOL.

Tourism as a socioeconomic force also has the potential to help reduce and eliminate poverty in destinations, and thus improve the economic well-being of local residents. However, the challenge still remains to empirically demonstrate this effect. It has been argued that tourism offers an alternative way through which developing countries can reduce or even eliminate poverty and enhance the level of economic growth. The two chapters on “Poverty Elimination through Tourism Dynamics” by Manuel Vanegas and “Tourism, Poverty Relief and the Quality-of-Life in Developing Countries” by Robertico Croes provide both a theoretical argument for the complex and multifaceted relationship between economic development and QOL using case examples from developing countries. In terms of policy implications, tourism has to be integrated into the country’ (or region’s) economic development plan. Much research is needed to empirically capture the complex interactions at different levels of analyses. Tourism expansion may augment human development, and it may decrease income inequality in developing countries. However, economic benefits do not occur without costs. The chapter on “Tourism and Quality-of-Life: How Does Tourism Measure Up?” by Janne Liburd, Pierre Benckendorff, and Jack Carlson demonstrates this conflict. They conducted an importance-performance analysis to identify the benefits and costs of tourism to community residents and tourists. With respect to community residents, the results indicate that tourism can provide significant economic benefits, but these benefits may come at the expense of social equity, cultural identity, and environmental sustainability.

QOL from the Perspectives of Tourists

Much of the research on tourist QOL from the perspective of tourists can be captured using the model in Fig. 38.1. The nature of travel and tourism research that addresses the issue of how tourist experiences contribute to the tourist’s QOL can be subsumed in the various components of the model shown in Fig. 38.1: (1) tourist characteristics, (2) trip characteristics, (3) moderators, (4) satisfaction with life domains, (5) satisfaction with life overall, and (6) consumption life cycle. This model is imbedded in the fully functioning tourism system.

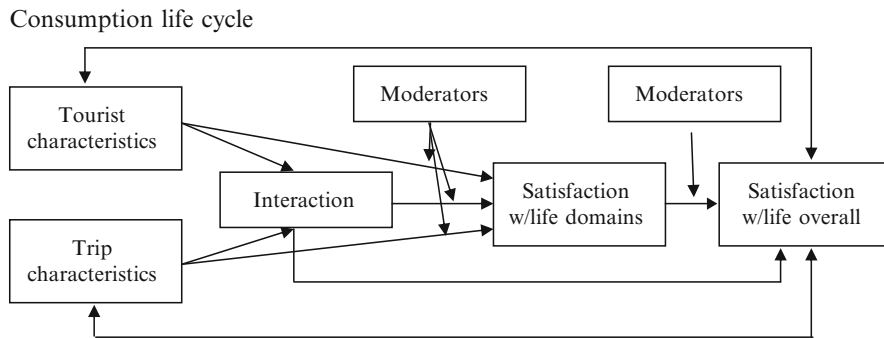


Fig. 38.1 An integrated model reflective of current and future research in the effect of tourism on the QOL of individual tourists

Tourist Characteristics

Tourist characteristics refer to factors directly attributable to tourists. Examples of such factors include tourist's demographic characteristics, psychographic characteristics, and sociocultural characteristics, among others. These studies make explicit attempts to relate differences in tourist's characteristics to satisfaction with specific life domains and overall satisfaction with life. For example, the chapter on "Tourist Consumption Behavior and Quality-of-Life" by Ruhet Genc focuses on demographic (e.g., age, gender, nationality, and social status), psychological (e.g., self-image, self-consistency, social acceptance), and cultural differences in QOL among tourists. In other words, this research attempts to uncover individual differences in the way tourism affects the QOL of individual tourists. In another chapter by the same author ("Subjective Aspects of Tourists' Quality-of-Life (QOL)" by Ruhet Genc), psychological factors related to the self-concept and personality are explored in relation to tourists' subjective QOL.

The consumer behavior research literature of consumer personality, psychographics, values, motives, beliefs, and reference groups is very rich. There are many concepts and models that can be borrowed from this literature to further the theory and research in tourism and QOL regarding this element of the model shown in Fig. 38.1 (tourist characteristics). Thus, new concepts and models can be deduced from the consumer behavior literature and tested in the context of tourism and QOL. One obvious example is the very popular VALS model (www.sric-bi.com/VALS/types.shtml) commonly used by marketers of large firms. Market segments such as innovators, achievers, thinkers, experiencers, etc., can be profiled in relation to how travel and tourism contributes satisfaction in social life, leisure life, family life, cultural life, etc. Conversely, many of the market segmentation techniques (e.g., cluster analysis) can be applied to tourism and QOL research in an inductive manner. In this case, data instead of theory should dictate. Applying market segmentation techniques may allow tourism and QOL researchers to identify unique segments that vary in terms of how tourism impacts their various life domains and life satisfaction at large.

Trip Characteristics

There are many factors directly related to tourist trips that may affect the QOL of tourists directly and indirectly. One such example is medical tourism. This handbook carries two chapters on this topic. The chapter on "Medical Travel and the Quality-of-Life" (authored by

Erik Cohen) focuses on delineating issues dealing with medical travel and QOL – the advantages of medical travel for patients' QOL, the kinds of treatments sought, the manner of their provision in the medical establishment abroad, and the problem of restitution in cases of malpractice. In contrast, the chapter titled "Medical Tourism and QOL: Physical, Physiological, and Social Aspects of QOL in Medical Tourism" (authored by Ruhet Genc) delineates the QOL benefits medical tourism bestows on patients: economic benefits, health benefits, and psychological benefits.

Future research may focus on developing a typology of types of tourist trips besides medical tourism to systematically investigate the effects of these trips on tourists' life satisfaction through different life domains. Examples of types of trips besides medical tourism likely to contribute to tourists' QOL may include pilgrimage tourism, nature and wildlife tourism, educational and cultural tourism, tourism related to business conferences, tourism related to sea/ocean cruises, tourism related to wellness resorts, etc. Other type of "trip characteristics" research in tourism and QOL may focus on specific aspects related to tourist destinations such as country image, political climate, crime and safety, perceived corruption, among others. These factors may impact tourists' satisfaction with the destination directly by impacting tourists' sense of well-being in various life domains and life at large.

Interaction Between Tourist and Trip Characteristics

There are many factors that capture the interaction between tourist and trip characteristics in relation to tourist satisfaction with particular life domains and/or satisfaction with life overall. For example, the chapter on "Place Affinities, Lifestyle Mobilities and Quality-of-Life" by Daniel Williams and Norman McIntyre focuses on the interaction between tourist and trip characteristics in the context of place attachment and its impact of tourists' QOL. The chapter titled "Tourist Motivation and Quality-of-Life: In Search of the Missing Link" by Graham Dann is also an example of the effect of the interaction between tourist and trip characteristics on QOL aspects. The focus here is the development of a theoretical model that links tourist motivation with profile variables, QOL domains, and overall QOL. The chapter on "Understanding the Antecedents of Destination Identification: Linkage between Perceived Quality-of-Life, Self-Congruity, and Destination Identification" (coauthored by M. Mithat Uner and Can Armutlu) is another case in point. The emphasis here is on the relationship among four concepts: QOL, self-congruity, satisfaction, and destination identification.

This area of research is highly fertile and can contribute significantly to our understanding of how aspects related to the tourists interact with aspects related to destination in influencing tourists' QOL. Certainly, future research is encouraged in this area. Examples of this research may include attitude models in which tourists behavioral disposition toward a destination is predicted by tourists' perceptions of the destination's wide range of costs and benefits and tourists' perception of the importance of these costs and benefits. Planned action models (e.g., theory of reasoned action) go beyond attitude to include other "interaction effects" such as subjective norms related to the destination and tourists motivation to comply. Value congruence models may also capture aspects related to tourists' value system and the destination image.

Invariably, it is the match between a set of psychological/sociological/economic dimensions of the tourist and a set of corresponding dimensions related to the destination that is likely to impact tourists' QOL. Identifying these variables related to person-environment fit can be a fruitful program of research in tourism and QOL.

Satisfaction with Life Domains and Overall Life Satisfaction

Trip experiences affect subjective well-being in the context of various life domains. A tourist trip can enhance family well-being, social well-being, leisure well-being, spiritual well-being, intellectual well-being, cultural well-being, and so on. Several chapters in this book focused on the effects of trip experiences directly on specific life domains. For example, the chapter on “An Analysis of Tourism QOL Domains from the Demand Side” by Laszlo Puczko and Melanie Smith focuses on the effects of tourism on subjective well-being in relation to various life domains. The chapter on “Perceptions of Tourism Impacts and Satisfaction with Particular Life Domains” by Philippus Stephanes Kruger focuses on how tourism experiences contribute to subjective well-being through the mediating effects of life domain satisfaction. The chapter on “Quality-of-Life and Travel Motivations Integrating the Two Concepts in the Grevillea Model” (coauthored by Sara Dolnicar, Katie Lazaervski, and Venkata Yanamandram) is another good example of tourism research dealing life domains. This chapter focuses on treating vacations as a life domain that contributes to life satisfaction. The chapter on “Relational Tourism: Observations on Families and Travel” (coauthored by Jay Mancini, Deepu George, and Bryce Jorgensen) is another case in point. This chapter focuses on the relational tourism (interactions among family members in the planning and consumption of tourism services) and its effects of family well-being.

QOL researchers typically treat life satisfaction as the ultimate dependent variable. Although much of the research in tourist QOL focuses on life satisfaction as the main dependent variable, the reader has to understand that there are other types of conceptualization of QOL besides life satisfaction such as positive and negative affect, eudaimonia, and absence of ill being (e.g., Diener 1984; Diener et al. 1999). And these conceptualizations of tourists’ QOL are subjective construals.

What about objective construals? Typically, QOL researchers who embrace the use of objective indicators of well-being focus on objective assessments of the various life domains and as such develop an overall formative measure of QOL based on the objective well-being dimensions reflective of the various life domains. For example, one can gauge the effects of some aspects of tourism experience on health status (measured by medical tests before and after the trip). Or how about capturing financial well-being in terms of actual differences between tourists’ allotted budget for the trip relative to their actual expenditures?

Moderators

One can argue that there are countless moderators affecting many of the relationships between the constructs in the integrated model: demographic, psychographic, sociocultural, technological, institutional, economic, etc. An example of such moderators is the use of the Internet by tourists to accomplish many things. The chapter on “Impacts of the Internet on Travel Satisfaction and Overall Life Satisfaction” (coauthored by Soo Hyun Jun, Heather Hartwell, and Dimitrios Buhalis) is an excellent example of the moderator category. The authors did a good job proposing two conceptual models to explore the impact of the Internet on QOL. The first model focuses on the role of the Internet as a tool to provide tourists information in the pre-trip stage. The second model focuses on the post-trip stage in which tourists share information about their travel experiences with others.

Focusing on tourist and trip characteristics (and their match and mismatch) and these effects on the sense of well-being in various life domains and overall can be construed as “main effects.” These effects can be enriched by the inclusion of moderator effects – demographic, psychographic,

sociocultural, technological, institutional, and economic, etc. Developing a program of research in tourism and QOL by expanding the main effects model to include these moderating effects is likely to be very fruitful in the further development of tourist/QOL research. We encourage future research in this area wholeheartedly.

QOL from the Perspectives of Residents

The QOL of tourism research model from the perspective of residents as part of the tourism system can be examined in the various components of the model shown in Fig. 38.2. The model postulates that the ways in which host community residents perceive their community living conditions, as impacted by tourism, would affect satisfaction in various life domains, which ultimately and cumulatively would affect residents' sense of community well-being and life overall. The nature of existing resources, natural, cultural, or human resources form and influence the basic tenets of both economic conditions and tourism infrastructure of the destination community. The economic conditions of the destination affect the perception of different impacts of tourism; the perceived impacts of tourism then affect support for tourism and types of tourism development. These elements of development interact and independently or collectively affect the well-being of society through life domains, and satisfaction with life domains then affect satisfaction with life in general in the context of the destination community. The degree of interaction and the perceived tangible and intangible impacts of tourism on the well-being of the destination community vary depending on the life cycle of tourism development at the destination. Impacts of tourism are moderated by a host of variables such as level of development; types and influences of stakeholders; and types of amenities, management actions, and marketing strategies; level of readiness of the destination community in terms of the ability to host and welcome tourists; and training and education of the personnel in terms of workforce.

This model reflects a significant departure from the long history of research examining resident perceptions of tourism impacts. Beginning in the 1970s, there has been a steady stream of research examining the impacts of tourism on host community residents. Much of the early research focused essentially on the perceived impacts of tourism as moderated by various socio-demographic characteristics. Perdue et al. (1990) enhanced this research by developing a model with resident support for tourism development as the primary dependent variable. In the subsequent 20 years, this model has been expanded in various communities, with various types of tourism development, and with increasingly sophisticated measurement and analytical processes (Jurowski et al. 1997; Gursoy et al. 2002; Andereck and Jurowski 2006; Gursoy et al. 2010). Still, the underlying goal of the Perdue, Long, and Allen model was to support further tourism

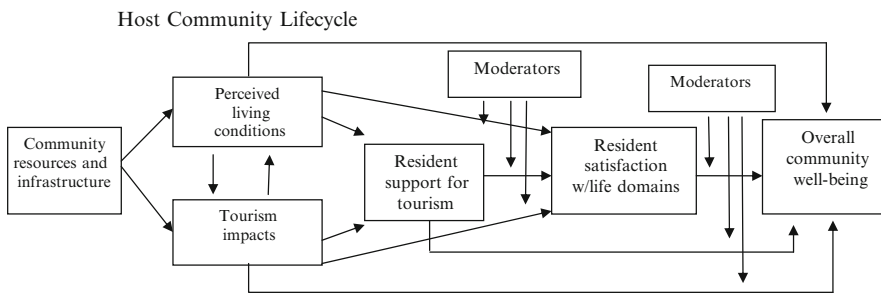


Fig. 38.2 An integrated model reflective of current and future research in the effect of tourism on the QOL of residents

development through management of resident tourism impact perceptions with the ultimate goal of growing the tourism industry and, most importantly, the associated tourism expenditures and jobs. Although in general several tourism studies examined perceptions of QOL of residents as part of community impact studies (Ko and Stewart 2002; Bachleitner and Zins 1999; Perdue et al. 1999; Roehl 1999), one of the first studies that attempted to establish the relationship between tourism impacts and the satisfaction with particular life domains resulting from tourism activities was conducted by Kim (2002), and subsequently, Kim et al. (2003) reported the findings that simply indicated that the relationship between tourism impacts and the satisfaction with particular life domains can be conceptually established and empirically substantiated. The same study also reported that this relationship varies at different tourism development stages as a moderating variable. Since then, a significant number of studies have emerged that examine tourism's relations to QOL issues at destination (e.g., Moscardo 2009; Wang et al. 2006; Andereck and Jurowski 2006).

The ways in which we measure the value of tourism, particularly by community development authorities, have shifted over the past 20 years with increasing emphasis on understanding the effects of tourism development on resident QOL as measured by their satisfaction with life domains and, cumulatively, by community life satisfaction. The central proposition of the following discussion is how this substantive shift in dependent variables impacts the conceptual structure and foundations of our research.

Community Resources and Infrastructure

The very existence of tourism depends on the nature of resources (human, cultural, natural, and man-made) and their development, spatial distribution, and availability of such resources at the destination. Research examining the effects of community resources and infrastructure on tourism development, the perceived impacts of tourism, and resident support for tourism development has two aspects. The first aspect is how to utilize and develop such resources, and once developed, how to manage them over time. However, the use of community resources has not been fully linked with the attainment of particular QOL goals. Much has been written about the adverse impacts of tourism on local communities, but relatively little research has attempted to examine how, for example, cultural tourism as a resource enhances QOL. The chapter on "Cultural Tourism and the Enhancement of Quality-of-Life" by Bob McKercher and Pamela Ho examines how cultural tourism enhances the QOL of community residents. Similarly, the chapter by G. J. Ashworth and J. E. Tunbridge on "Heritage, Tourism and Quality-of-Life" makes an argument that heritage as the contemporary uses of pasts delivers an "identity dividend" that contributes toward not only the quality of the tourist experience but also toward the well-being of residents. As a cultural resource, the ethnic diversity of places also has potential to enhance both the QOL of residents and tourists. The chapter on "Ethnic Tourism and Resident Quality-of-Life" (coauthored by Li Yang and Xiang Robert Li) provides such an example. The connection between types of resources in a given destination and how such resources may impact support for tourism and resident satisfaction with life domains (and thus, overall community well-being) offers an ample opportunity for researchers to pursue new research areas. The chapter on "Alternative Tourism as a Contestable Quality-of-Life Facilitator" by David Weaver presents the evidence from farm tourism, volunteer tourism, and community-based ecotourism. The evidence indicates that expected QOL benefits are not always realized and that ideal type characteristics may be an impending factor. This chapter focuses on both transitional and transactional modes of alternative tourism that incorporates the positive QOL effects of scale economies. Such an approach may provide to be more beneficial alternative to conventional alternative tourism.

Regardless of the type of resource and tourism product, the resource base needs to be augmented by a range of different forms of capital, including social capital of the destination community. The chapter on “Building Social Capital to Enhance the Quality-of-Life of Destination Residents” by Gianna Moscardo argues that we need better ways to analyze and understand the idea of QOL within tourism and offers an approach that considers QOL as based upon social capital and its salient dimensions. By combining the dimensions of integration, linkage, synergy, and organizational integrity, it is possible to create different and desired outcomes, including resident QOL goals and related expectations, for communities. Identifying the level and role of capacity building and social capital can be an exciting yet challenging program of research in tourism development and QOL. How capacity building may show variation from one type of tourism activity (nature- vs. culture-based tourism activities) to another (Aref and Redzuan 2009) and its impact on QOL is another area of research that certainly needs sustained and further development. Capacity building can also serve as a moderating construct between support for tourism development and satisfaction with life domains and community well-being.

Much of the early research on tourism impacts was conceptually couched within the construct of carrying capacity, the premise of managing development with the framework of acceptable change in the community’s resource endowments (Perdue et al. 2010). Early research examined resident perceptions of tourism impacts across communities with varying levels of tourism, concluding that resident support for tourism would decline if the tourism industry became too large proportionate to other industries in the community. Further research in this vein examined not only the levels of development but also the speed of development and the community’s ability to adapt. There has been limited work that attempted to establish the assumed relationship between tourist area life cycle (TALC) and its effect on the QOL of destination residents. The chapter titled “The Tourist Area Life Cycle (TALC) and Its Effect on the Quality-of-Life (QOL) of Destination Community” (coauthored by Muzaffer Uysal, Eunju Woo, and Manisha Singal) provides a comprehensive treatment of the linkage between levels of tourism development and its effects on QOL of residents over time. Destinations change over time, and that the change certainly affects the QOL of residents’ life as well. How levels of tourism development affect both visitor experiences and residents’ QOL needs further research. For each phase of development, destination communities need to develop indicators and also monitor those indicators in terms of how they may affect the well-being of destination community. The evolution of the construct of sustainable tourism has contributed substantively to the resurgence of carrying capacity with its different applications and interpretations, limits of acceptable change, and their relations to QOL. This is reflected in this book by the chapter titled “Relationship between Carrying Capacity of Small Island Tourism Destinations and Quality-of-Life,” coauthored by Deborah Kerstetter and Kelly Bricker. A location that experiences a huge growth cycle would need to take great care in monitoring the implications of such an influx of tourists and the social ramifications they could bring to the area in order to maintain the desired level of QOL.

Moderators in Community Tourism

There could be many types of moderators affecting many of the relationships between the constructs in the integrated model of Fig. 38.2: stakeholders and their roles, types of tourism development and product offerings such as gambling, levels of tourism development, and host community lifecycle, etc. Recently, as a function of the accession of sustainable tourism, research has focused on examining the construct of tourism and community stakeholders, with particular emphasis on how to identify, involve, and work with various stakeholder groups. This book includes two chapters that directly examine QOL among destination stakeholders. For example,

the chapters on “Quality-of-Life Values Among Stakeholders in Tourism Destinations: A Tale of Converging and Diverging Interests and Conflicts” (Klaus Weiermair and Mike Peters) and “Stakeholder Engagement in Tourism Planning and Development” (coauthored by Lisa C. Chase, Benoni Amsden and Rhonda G. Phillips) both focus on different aspects of stakeholders emphasizing the fact that stakeholders are affected in different ways by tourism development as some stakeholders may experience an increase in their QOL, others may see a decrease in QOL, and still others may experience mixed impact. The challenge is how to make sure that depending on the goals and objectives of different stakeholders, we can constructively engage stakeholders in the planning and development of tourism projects and related activities so that tourism activities do not impinge on the QOL values of stakeholders but help improve their QOL as result of tourism. The degree to which stakeholders get involved in the development of tourism would also moderate and influence the relationship between perceived tangible and intangible impacts of tourism and their impact on satisfaction with life domains in general and more specifically overall community well-being. Therefore, for development strategies to be sustainable, destination developers and planners need to know how citizens view their QOL and how they might react to proposed strategies. From the limited research (Jurowski and Brown 2001), we know that residents who belonged to no community organizations evaluated the quality of most aspects of their lives lower than those who are most involved. That is, there is a positive relationship between membership in community organizations and residents’ satisfaction with their quality-of-life. There is still much work that needs to be done in this area of research. But, the propelling force of the fully functioning tourism system requires that destinations manage their resources and skills available to successfully achieve their QOL goals while delivering quality services and maintaining a sustainable tourism development outcomes. The chapter on “Destination Competitiveness and Its Implications for Host-Community QOL” by Geoffrey I. Crouch and J. R. Brent Ritchie tells us that destination competitiveness is not necessarily about attracting more tourists. Rather it is about knowing how to use the resources and skills to achieve QOL goals while simultaneously delivering high quality experience to visitors. Improving competitive capability and supporting this by some form of structured management effort is vital if tourism destinations are to contribute to the QOL of destination residents. “Destination Management, Competitiveness, and Quality-of-Life: A Review of Literature and Research Agenda” (B. Bynum Boley and Richard R. Perdue) provides an agenda for future research on the interface between destination competitiveness and sustainability, with specific focus on the associated resident QOL. The chapter “Destination Management and Quality-of-Life,” by Ige Pirnar and Ebru Günlü, also stresses the interface between the competitiveness of the destinations and QOL. A major lesson from their study is if the destination is not managed and marketed appropriately, then it is very likely that destination competitiveness could also affect the QOL negatively. Although the current DMO management philosophy is largely focused on destination competitiveness, we believe that in the future, DMOs would also need to be concerned more about the degree to which their residents are satisfied not only with tourism and recreation amenities but also by how such tourism activities and amenities in general may contribute to the QOL and community well-being, which in turn may also increase support for tourism and further contribute to the competitiveness and attractiveness of the destination place.

Naturally, destinations need to also develop appropriate mechanisms and strategies by which they can ensure that tourism development is sustainable. Community participation is a vital component of such development. The chapter “Community Participation in Tourism Planning and Development” (Amir Shani and Abraham Pizam) argues that community participation is a must in achieving both planning-oriented and community-oriented objectives for tourism development to be linked to local residents’ QOL.

Furthermore, the chapter “The Role of Tourism in Sustainable Communities” (Timothy J. Tyrrell and Robert J. Johnston) argues that a dynamic analysis of tourism sustainability can be

implemented within the context of broader community goals by adding sociocultural and environmental dimensions to the traditional economic bottom line. Such an approach allows us to equate the quest for sustainability with the quest for an optimal path to long-term stability where visitor variables may be used to control community QOL assets. Jeffrey M. Rempel in his chapter titled “Exploring the Causal Nexus of Tourism Impacts on Quality-of-Life” uses the ecosystem approach which recognizes that humans, with their cultural diversity, are an integral component of ecosystem. The chapter also demonstrates how a complex and adaptive nature of tourism can be made sustainable and also improves local QOL. The author used Northern Vancouver Island, BC, Canada, as a case in point. By combining and using pragmatic tools, including adaptive management, a modified DPSIR (Driver, Pressure, State, Impact, Response) framework, we may provide an effective method to better deal with challenges associated with how residents’ QOL is impacted by tourism.

Perceived Living Conditions

The research to date in the area of community tourism development and resident support for tourism introduced the notion that resident perceptions of community living conditions would affect both their perceptions of tourism impact and their support for incremental tourism development. Perceived living conditions in a given place may be a function of several attributes: health of the local economy, perceived livability of the place, types of amenities, safety, level of attachment to that community, economic and political stability, ease of access to amenities, availability of open space, employment level, cost of living, perceived crowding and congestion, support for education and public services, level of public spending, and the like (Uysal 2010). The assumption is that there is a reciprocal interaction between perceived living conditions and perceived impact of tourism. Limited research in tourism exists that makes such a connection. One of the earliest studies in this area was conducted by Perdue et al. (1991). That study used a list of objective indicators of resident QOL as a function of tourism development and explored the effects of tourism development on the select objective QOL indicators within the domains of economics, education, medical services, welfare services, and crime. The unit of analysis for the study was counties of North Carolina, categorized into five levels on the basis of tourism expenditures. A similar study by Meng et al. (2010) found a correlation between differing levels of tourism development and QOL indicators. The study conducted on China revealed that the residents of provinces with the highest level of development lead a significantly “better life” than those who are in the regions on medium or low level of tourism development as measured with a select number of objective indicators of QOL. The study indirectly examined the connection between levels of economic living conditions and its impact on tourism QOL.

As we move more toward general societal goals and improvement of QOL of individuals as tourists and residents as providers, there is room for further research that could explore the interaction between living conditions in relations to tourism impact and overall community well-being.

Tourism Impact

As noted earlier, tourism research examining host community residents began by studying resident perceptions of the various economic, social, and environmental impact of tourism on the local community. It is very interesting to note the evolution of host community tourism research from a perspective wherein tourism impact was the primary dependent variable to the perspective

advocated by our Fig. 38.2 model wherein tourism impact is a substantive independent variable. Clearly, we have shifted from trying to understand and describe the impact of tourism to attempting to understand how this impact changes the QOL for community residents. That is not to suggest that the impact of tourism is any less interesting or in need of further research. Two really important community tourism impact research trends exist.

First, the construct of sustainable tourism has again substantively influenced this research. Intergenerational equity is a key component of sustainability, shifting our focus to balancing the current utilization of community resource endowments with the preservation of those endowments for future generations. Whereas historically we asked a lot of questions about “how has tourism changed your community in the past and present,” we are increasingly attempting to understand “how will tourism change the community into the future.”

Second, we have broadened our definition of tourism and its impact. Most importantly, we have focused increasing attention on the effects of second home/vacation home development. In this vein, Long et al. (2005) concluded that the construction, maintenance, and management of second homes/vacation real estate was a substantively larger industry segment than tourism services (e.g., hotel, restaurant, attractions, etc.). There is a growing body of research examining the impacts of these “secondary sectors” of the tourism industry. The chapter titled “Rural Tourism and Second Home Development: The Case of Colorado” (coauthored by Patrick Long, Mick Ireland, Derek Alderman, and Huili Hao) documents the substantial impact of second homes on the region’s economy and on the number of jobs created due to home construction, maintenance, operations, as well as second home services, which in turn further improves the well-being of community, thus contributing to the long-term sustainability of rural destination communities. Another chapter titled “The Effect of Tourism on the Housing Market” (coauthored by Bianca Biagi, Dionysia Lambiri, and Alessandra Faggian) first examines the hedonic price method as a mechanism to explore how tourism-related amenities can be quantified and developed into one of the measures as a single item variable or composite tourism index that may affect house price information with QOL considerations. By examining how demand for this type of accommodation in tourism destinations can affect the functioning of local housing markets, the level of affordability can be ascertained to address problem areas and policy challenges. Again, we see tremendous potential here for further research that can examine the impact of second home demand and affordable price options on both actual and perceived objective and subjective well-being of individuals as owners and residents in the destination community. How to monitor and manage such a growth over time without impinging on the well-being of communities also presents new research opportunities in tourism and QOL.

Resident Support for Tourism

As noted, for many years, resident support for tourism has been the primary dependent variable for host community resident research. This trend continues, but both the measurement and structure of the variable has grown increasingly sophisticated. Several studies using confirmatory factor analysis and structural equation modeling have created very sophisticated scales with excellent validity and reliability. Further, alternative measurement procedures are evolving using qualitative analyses. More importantly, this research increasingly recognizes the variance within the construct of tourism. Increasingly, this research is examining support for different types of tourism, different levels of tourism development, and, within type and level, different types of tourists. Research examining the potential conflicts, relationships, and interactions between tourists and host community residents has evolved to better articulate “support for tourism.” Although there has been, as mentioned, limited work that attempt to establish the connection between

perceived impact of tourism and satisfaction with life domains and overall community well-being, we encourage and challenge tourism researchers to conduct empirical research that may use a multi-methods approach from their own area of interest and expertise.

Resident Satisfaction with Life Domains

The quality-of-life literature increasingly recognizes that one's happiness is a function of her/his well-being across a number of life domains, including economic, social, environmental, consumer, and health domains. These domains have been measured using both objective and subjective measures. However, subjective measures have dominated this literature. As an early example of this research, Allen et al. (1991) surveyed residents of 20 rural Colorado communities with varying levels of tourism development, measuring their satisfaction with community medical services, economy, environment, public services, formal education, recreation opportunities, and citizen involvement. They correlated those domain measures with overall well-being measures ("community as an ideal place to live" and "community effectiveness"). Subsequent research has greatly improved both the domain satisfaction and the global measures of well-being (e.g., Andereck and Jurowski 2006; Kim et al. 2003; Kim 2002; Ko and Stewart 2002; Bachleitner and Zins 1999; Roehl 1999). Similar work has been done both for tourism as a whole and for various types of tourism. For example, the chapter on "Resident Quality-of-Life in Gaming Communities," coauthored by Patricia A. Stokowski and Minkyung Park, points to two types of research that are common: understanding residents' attitudes toward current and future gaming tourism development and then measuring tangible and intangible community impact associated with such development. The authors argue that consideration of QOL issues in gaming communities brings to the forefront personal and collective values, community participation, and more importantly the preservation of valued social, cultural, and environmental qualities of a community.

Far less research has been conducted examining objective indicators of resident QOL as a function of tourism development. We encourage future research in this area whole heartedly.

Further Research Areas

A number of communities in the USA and elsewhere have developed and are in the process of developing local sustainable tourism indicators in order to measure and monitor the consequences of tourism. The main goal is and should be not only to measure progress toward achieving more sustainable tourism development and its associated policies and but also improve the QOL and well-being of different stakeholders that may involve directly or indirectly in the production and consumption of tourism goods and services. The key challenge is always how to develop a set of measures to provide a baseline against which to assess, monitor, and measure change at different points in time (McCool and Moisey 1997). Although a number of such measures are commonly available and identifiable, their measurement and operationalization should always reflect the community in question for which measures should be defined and developed (Sirgy et al. 2010). McCool (2009) points out that understanding what is to be sustained is a significant question in the pursuit of tourism sustainability indicators. A variety of potential metrics can be used to assess the sustainability of tourism in a destination (Smith 2010; Choi and Sirakaya 2006). However, the challenge still lies in the area of compliance with such measures (Sirakaya 1997; Sirakaya and Uysal 1997). The measures naturally should reflect both objective indicators of QOL and also

subjective indicators of QOL in relation to different phases of economic development in a given destination. We encourage researchers to develop a measure of community well-being that can focus on perceptions of tourism impact and various life domains.

Recent trendy concepts such as “smart growth,” “slow food,” “slow-growth city” (cittaslow: <http://www.cittaslow.org>) all offer alternatives to standardized product offerings with less authenticity and encourage small towns (population with 50,000 or less) as destinations to maintain and celebrate a slower pace of life among its citizens. By doing so, citizens of such communities have a voice in the pace and direction of economic activities, including tourism developments and projects. The implicit assumption here is that ultimately residents should have the power to control and draw the boundaries of interaction between the visitors and visited, thus providing and maintaining the desired level of local flavor, culture, and cuisine, which in turn should enrich the QOL of both visitors and residents. This may be accomplished through participation in decision making and planning process and effective governance. The desire to have a slower pace of life would be a matter of choice of residents to maintain the level of QOL they would like to sustain. We believe that as the number of slow-growth city members increases, there will be fertile ground for researchers to examine if QOL of participants and community residents can be improved and sustained through implementing policies related to the slow-city strategy. How tourism activities and their benefits are perceived to affect the QOL of different stakeholders in slow-growth cities can reveal clues as to how to monitor use levels and demand for attractions and amenities and better manage destination resources. A place that cannot control the rate of its development is likely to lose its identity, authenticity, and charm which in turn can make the place less attractive and competitive and decrease the QOL in that place.

If the development of tourism results in a lower QOL over time, residents may be reluctant to support tourism in their community. Therefore, government planners and community developers should consider residents’ attitudes and opinions when they develop and market recreation, travel, and tourism programs, and help residents realize not only their basic needs but also growth needs (social, esteem, actualization, knowledge, and aesthetics needs). Measuring QOL of residents based on this ideal and monitoring changes in perceptual and actual terms over time needs to be in place at destinations that are popular and well visited.

There are many challenges that we face doing research in this area. There are multi-level issues. There are issues of clear measurement related to QOL indicators. There are issues related overlapping life cycle stages. There is also the involvement of various stakeholders groups and their various goals and agendas. We as researchers need to develop better methods to address this complex reality. We need to inject better theory that can help evaluate the effectiveness of government planners and community developers’ marketing strategies. In addition, developers and researchers in tourism should work closely with one another and seek alternative and efficient ways to mitigate the negative and increase the positive impact of tourism in communities. In doing so, we may be in a better position to contribute more significantly to the QOL of destination residents and its stakeholders.

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