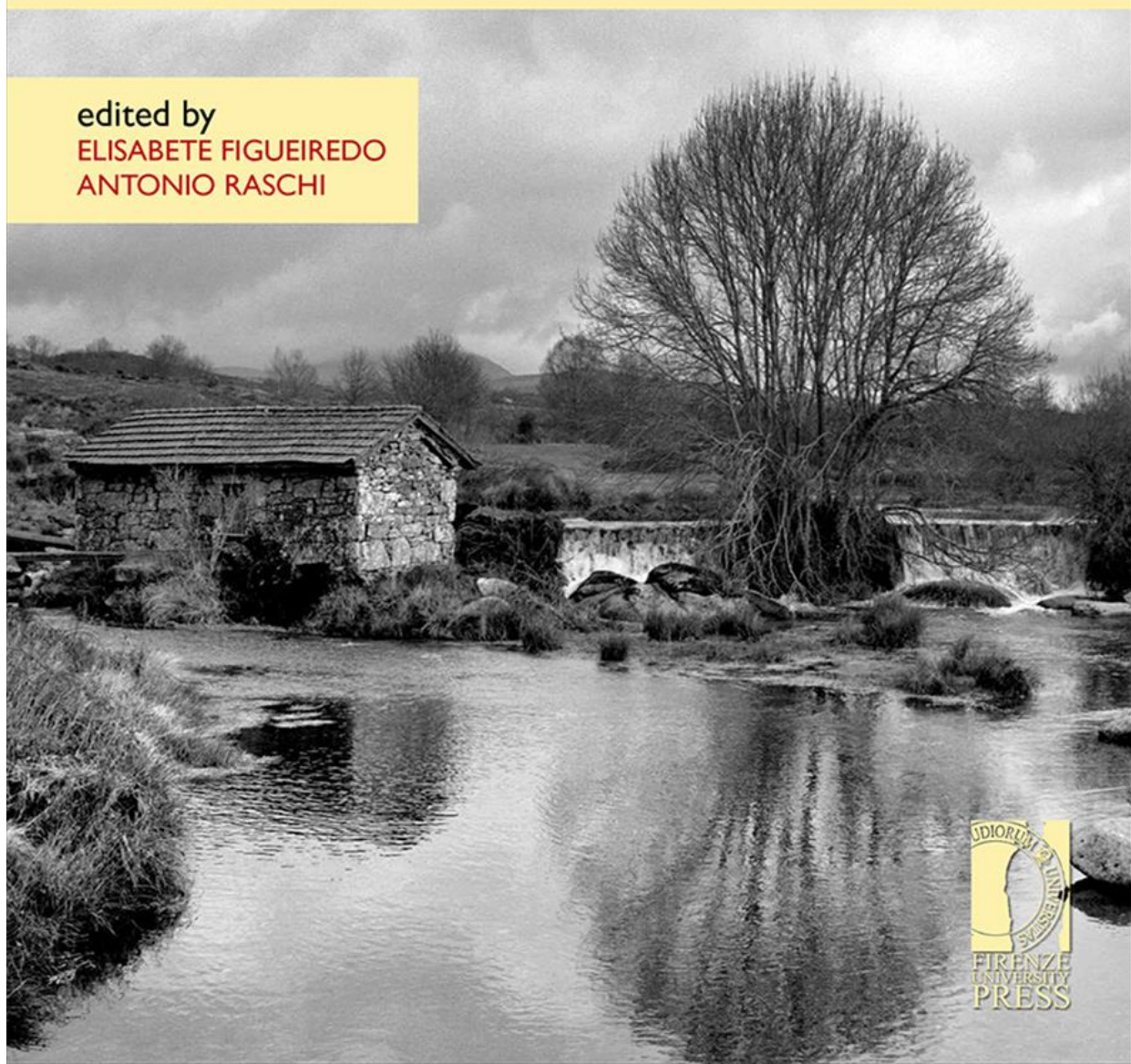


# Fertile Links?

Connections between tourism activities, socioeconomic contexts and local development in European rural areas

edited by  
ELISABETE FIGUEIREDO  
ANTONIO RASCHI



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## **Fertile Links? Connections between tourism activities, socioeconomic contexts and local development in European rural areas**

Despite their diversity, European rural areas are facing major changes in economic and social terms, mainly due to transformations in the role, meaning and place of agriculture. These changes have been widely debated over the last decades, from diverse theoretical and methodological points of view (e.g. Cloke, 2006; Cloke & Goodwin, 1993; Halfacree, 2006; Figueiredo, 2003; Marsden, Lowe & Whatmore, 1990; Marsden, 1998; Mormont, 1994; Shucksmith, 2006). Although the impacts of the transformation processes have been diverse in different rural contexts, the general tendency seems to be a profound change in agricultural activities (e.g. Marsden, 1995, 1998; Figueiredo, 2008; Jollivet, 1997; Ramos-Real, 1995). Particularly in peripheral European regions the impacts resulted in a more intense loss of competitiveness and the decline of the productive character strongly contributed to the emergence of new roles and functions for rural areas. The rural that emerges from these processes is frequently presented, both in the academic and in the political spheres, as multifunctional (e.g. CCE, 1988; Oliveira Baptista, 2006).

Without denying the relevance of the concept of multifunctionality and its effective and well succeed operationalization in some cases, it is therefore worthwhile to question the reasons that led to a generalization of this perspective in the last two decades (Figueiredo, 2011). The (agricultural) monofunctionality and the identity based on it, which marked rural areas throughout centuries, seem nowadays to be replaced by a certain functional schizophrenia to which rural areas appear unable to correspond, given the absence of the necessary tools and capacities (e.g. Figueiredo, 2011; Nave, 2003). The agricultural, economic and social crises that characterize

<sup>1</sup> Corresponding author, elisa@ua.pt.



many remote rural areas of Europe (Ramos-Real, 1995) are also an identity crisis.

These tendencies have been supported by the European Union political strategies regarding rural development since the end of the 1980s (e.g. Figueiredo, 2008; Halfacree, 2006) and resulted in programmes and measures that emphasise the combination of agriculture with other functions and activities, contributing to transform rural areas into consumable spaces (e.g. Figueiredo & Raschi, 2012; Halfacree, 2006). Among the new functions of this rural which is beyond agriculture (Marsden, 1995, 1998), which is to be consumed, leisure and tourism activities seem to play a paramount role. Nowadays, rural areas are “often considered as ‘consuming idylls’<sup>2</sup>, directly opposing ‘super-productivist’ spaces (...)” (Figueiredo & Raschi, 2012: 19), where spatial (and social) practices are consumption-oriented (e.g. Bell, 2006; Short, 2006). These consumption practices are mainly based on the representations of the rural as environmental and cultural reserves, in a rather positive manner.

Considering the processes described above, rural tourism emerged as their *natural consequence* and as a new entrepreneurial range of activities expected to give a powerful contribution to rural development. Notwithstanding the difficulties in defining rural tourism in a consensual manner (e.g. Keane, 1992; Lane, 1994), a common (yet very broad) definition suggests it as being the entire tourism activity developed in a rural area, motivated by features of rurality (e.g. Lane, 1994; Kastenholz & Figueiredo, 2007). In fact, “rural tourism should ideally be, apart from located in rural areas, functionally rural; rural in scale; traditional in character; organically and slowly growing and controlled by local people” (Kastenholz & Figueiredo, 2007: 2). Taking this description, rural tourism seems to stand on local activities and specificities, therefore contributing to improve local communities’ economy.

In fact, rural tourism is frequently presented (mainly at the political level) as the panacea to solve rural areas’ problems and constraints (e.g. Cristóvão, 2000; Kastenholz, 2004; Ribeiro & Marques, 2002). However, empirical evidence has shown that the connections between tourism activities and the broader rural contexts are often faint and fragile, despite the plurality of situations (Figueiredo and Raschi, 2012; Ribeiro & Marques, 2002). On the one hand this fragility can be attributed to the economic and social vulnerability of many rural areas. On the other hand, rural tourism establishments, for their private character and limited dimension, cannot be held responsible for local development (Balabanian, 1999; Kastenholz & Figueiredo, 2007; Ribeiro & Marques, 2002, Solla, 1999).

Empirical evidence shows that tourism promoters often act in an ‘isolated’ manner, sometimes detached from local contexts and specificities,

<sup>2</sup> Halfacree (2006: 57).

although benefiting from them mainly in promotion and advertisement. Frequently they use traditional local features (e.g. landscape, natural resources, food productions, agricultural practices, festivities) to promote the establishments and to attract guests, but in practical terms those features are not materialized in the services and activities offered. In consequence local resources are not being capitalized and valued and the specific character of rural tourism (being attached/ connected to local contexts) is not fulfilled (e.g. Figueiredo & Raschi, 2012; Perkins, 2006).

Some studies have demonstrated that building efficient networks – *fertile links* – between tourism promoters and other local agents and actors can result in successful rural tourism activities and in local development (e.g. Brunori & Rossi, 2000; Brunori, 2007). However, the same researchers evidenced the difficulties and constraints in building collective action and synergies among the diverse rural stakeholders, due to their characteristics, to the peculiarities of the socioeconomic contexts (particularly in remote rural areas) as well as to the lack of adequate political and institutional measures, strategies and instruments to foster local cooperation (e.g. Brunori, 2007; Malevolti, 2003; Vieira & Figueiredo, 2010).

Tourism has also an important role in changing the face of rural communities impacting in diverse ways in their environmental, economic, social and cultural structures, processes and dynamics (e.g. Andereck, 1995; Andereck, Valentine, Knopf & Vogt, 2005). In fact, as Butler & Hall (1998) recognize, tourism largely contributes to the formation of places, fostering reconfiguration and restructuring processes that tend to create new ruralities and, in some cases, a rural that is mostly urban in terms of its conception and image as well as in terms of the functions and services it provides to the society as a whole (e.g. Butler & Hall, 1998; Crouch, 2006; Figueiredo, 2011), particularly to address the demands, needs and desires of tourists that wish to experience the authentic local character (e.g. Butler & Hall, 1998; Crouch, 2006; Figueiredo & Raschi, 2012; Meethan, 2001; Perkins, 2006).

In addition, tourism activities may contribute to increase conflicts, among local population and between rural dwellers and tourists and tourism operators, therefore also contributing to reshape rural contexts (e.g. Figueiredo, 2009; Brandt, Haugen & Kramvig in this volume). Conflicts may arise both because of material and symbolic matters, also impacting into the practices and representations towards the rural (e.g. Figueiredo, 2009).

Considering the transformations that rural areas and activities underwent in recent decades, together with, on the one hand the constraints that rural tourism seems to pose in reshaping an already existing reality, and, on the other hand, to face as a new tool for local development, innovative strategies and processes clearly seem to be needed. As the chapters included in the third part of this book visibly demonstrate, innovation is required regarding a wide range of domains. First of all the political and funding

mechanisms context should respond to the new requirements and characters of a changed and changing rurality. Cooperation, collective action, synergies, i.e., efficient networking among all the actors, institutional bodies and enterprises seem to stand out as major tools to promote fertile links which can effectively contribute to improve local economies (in line with the findings of Belletti *et al.*; Rønningen, in this volume; Brunori & Rossi, 2000; Brunori, 2007; Vieira & Figueiredo, 2010). The development of new touristic initiatives based on old or new products and activities (as Rêgo discusses in this volume), together with updated marketing and branding strategies (Spilková & Fialová, in this volume) may also present new market opportunities to meet the new and diverse demands as well as to sustain local economies.

The present book, focusing mainly on peripheral rural areas, aims to contribute to foster the debate about some relevant and not yet comprehensively researched aspects within the several issues related to the liaisons between tourism activities, socioeconomic contexts and local development, especially in what extent tourism, in its various forms and processes, might give an important contribution to rural development. By considering different theoretical and methodological approaches and diverse European rural realities, the book explores the relationships among rural tourism and the complex interactions, conflicts and innovative processes developing in rural territories as consequence of the implementation of tourism activities.

Originating from a working group, organized by the editors and included in the XXIV Congress of the European Society for Rural Sociology, held in 2011 in Crete, Greece, the book gathers a selection of eight papers among the nineteen presented at the session, together with two chapters from invited authors. Apart of this introductory chapter, the book is organized in three main parts, comprising ten chapters.

Part One – *Concepts and Visions: is tourism promoting new ruralities?* – deals with the notions and perspectives on the connections between rural tourism and local contexts, considering the diverse expectations and visions between the need to achieve sustainability and the ongoing commodification and new ruralities' construction processes.

In chapter 2, Oliva and Camarero, using a qualitative approach, explore the relationships between rural tourism and local development, analysing the polarization between productive and post-productive rurality in the Navarre region in Spain. The authors also analyse the processes deriving from the social interactions and practices that characterize the touristic experiences. They conclude that tourism do transform rural contexts, by stimulating local economies through the use of marketing and branding strategies which shape new narratives and representations of rurality. However, tourism development may equally originate a global rurality, based on generic features, rather than on local attributes and identities.

The global and hegemonic image of the countryside is also explored in Chapter 3, in which Figueiredo, Kastenholz and Lima analyse, through content analysis of in-depth interviews, how symbols and images of rurality that characterize the point of view of the hegemonic urban culture are more and more detached from the materiality of the rural territories. This phenomenon goes in parallel with the loss of the productive role of these areas and their commodification. The mentioned images and symbols seem increasingly also to be part of the social representations of the local populations regarding the countryside. In this perspective, the authors report about the visions held by both visitors and residents of two small Portuguese villages, evidencing the differences, reflecting different experiences and meanings, but also some similarities and suggesting the existence of globalized views about the countryside.

Chapter 4, by Craveiro, Dias-Sardinha and Milheiras, debates, on the basis of a mixed qualitative and quantitative approach, about the perception of local identity by local social actors and visitors, reporting about a research study carried out in a rural post mining area (São Domingos Mine, Southeast Portugal), where cultural tourism is expected to trigger local development. Social actors and entrepreneurs underline the local mining identity as the main local asset, while natural and rural landscape and the peaceful character of country life are by far more appreciated by visitors. This might be consequence of the peculiar character of tourism in the area (most of tourists have family links with the local inhabitants), but is after all in agreement with previous researches, showing the limited interest of tourists in the site-specific cultural dimension. All the stakeholders considered in the study pointed out the need to expand tourist services, in order to contribute to strengthen the role of local heritage in the development of this specific type of tourism.

In Chapter 5, Belletti, Brunori, Marescotti, Berti and Rovai, discuss the real sustainability of rural tourism. Using the concept of tourist configuration, the authors analyse the dynamic relationships between local and extra-local actors to explore the issue of sustainability in two areas of Tuscany (Italy), characterized by different tourism dynamics. While in a first phase, in fact, rural tourism was considered sustainable by definition, as it depends on nature, landscape and culture conservation, nowadays increasing concern exists about the pressure rural tourism creates by its use of limited resources (soil, water, energy etc.). The studied cases evidence that collective action is a relevant aspect to obtain sustainability and stress the need to build strong links to foster cooperation between individuals and institutions.

The second part of the book – *Conflict and complementarities: old and new activities, old and new actors* – focuses on tensions that may arise between the local traditional productive structures and the new actors and activities, debating on how pluriactivity can transform the professional perspectives in rural societies.

In Chapter 6, Brandth, Haugen and Kramvig discuss, using a qualitative approach, the social interaction between entrepreneurs establishing farm tourism business and the local communities. The authors stress that establishing a new business in a rural society might challenge local practices and power relationships, and explore the kind of opposition entrepreneurs can meet, and how they can handle it. The fieldwork was conducted in different districts of Norway on family farms combining agriculture and tourism, and on farms that abandoned agriculture to focus on tourism only, showing that all entrepreneurs experienced challenges in their attempt to introduce new practices and new ideas, but in general these did not result in large and destructive conflicts. The chapter illustrates the negotiations needed to cope with local interests and values.

Chapter 7, by Meiberger and Weichbold, reports about a qualitative study conducted in the province of Salzburg, Austria, exploring the connections between farming and tourism and the factors determining success or failure. Tourism represents an indispensable part of Austria's economy, and it is very tightly tied to cultivated landscape. In particular, tourism yields up to 50% and more of the farm enterprises income in summer farms in the Alps. The authors stress the differences among tourists, with respect to requirements, and the need to carefully evaluate the farms' capacities, the human resources, the need of an active attitude to meet diverse challenges, as well as the large support that can result from networking and cooperating with colleagues, authorities and from family team work. Education and lifelong learning seem to be, among other, relevant factors to gain a professional attitude and pursue diversification.

Multifunctionality and pluriactivity are the topics addressed in Chapter 8, by Koutsouris, Gidarakou, Kokkali and Dimopoulou reporting about a quantitative study conducted in the areas of Lake Plastiras and Dorida (Greece). This rural area saw a quick touristic development in the last two decades, while agriculture was becoming a secondary occupation for most of the inhabitants. As a result, most of the families make a living out of tourism, while agriculture is a secondary source of income, also showing limited connections between the two activities, in particular for the younger generations that are mainly employed in the tertiary sectors (services to enterprises and tourism) and are not pluriactive. In this chapter, taking the local reality analyzed, the sustainability of a development based on multiple activities is debated. Its risks are outlined, given the abandonment of agriculture by the young generations, the commodification of the rural space, the vulnerability of rural tourism under conditions of economic crisis.

Part Three – *Innovation in rural tourism and local development* – enlightens the diverse aspects of the innovation role that rural tourism and related links and networks can exert in local communities, showing that sometimes the very faint connection between local reality and tourism enterprises prevents the development of a real positive action.

Chapter 9, by Rêgo, based on content analysis of documents and on interviews with local agents, focus on the innovative touristic initiatives related to the production of wine, olive oil and other typical productions in Alentejo region, Portugal. The majority of these flagship initiatives are oriented to new demanding, affluent and urban market niches. These enterprises, although based on synergies between farming and tourism, represent somehow a discontinuity with the surrounding environment, and differ from the traditional small tourism units scattered in the territory. However these units possess the capacity to build innovative economic resources, taking their lead from the existing territorial matrix and mobilizing the local knowledge and skills, therefore contributing to revitalise *forgotten* places and, to a certain extent, also to reshape the identity of the areas in which they operate.

In Chapter 10, based on a quantitative approach, Rønningen deals with innovation in rural tourism enterprises in Norway. The author notices that, generally, innovation systems are characterized by relations with universities and research institutions, as well as with financial institutions. These conventional innovation systems are absent in the world of rural tourism, as staff usually lacks the qualification needed to interact with R&D bodies. Yet, previous research proved that Norwegian rural tourism firms are usually able to innovate. The paper explores the character of knowledge base of the examined enterprises, relying mainly on experience, and the exchange of information, ideas, best practices, that can allow defining the network of enterprises as a loosely coupled system. The role of public funding agencies in innovation is also outlined, together with internal driving forces stimulating actions and efforts.

In Chapter 11, Spilková and Fialová, combining qualitative and quantitative data, discuss the possible links between regional branding of products and tourism, based on a field research conducted in Czech Republic. The authors underline that regional or quality branding is a well known and effective tool for promoting typical products of rural regions, but, in addition, it can become also a way to support sustainable development, by creating links among different enterprises. In fact, in the area of study, before the introduction of branding, the agents of the production systems had scarce links to each other; nowadays, the existence of a branding scheme is also used to finalize funding actions, making the support more fruitful. The research focus on the possibility of creating relationships between regional production and tourism activities, evidencing the great potential still unexpressed for fruitful connections, as well as the existing limits related to scarce marketing tools, lack of financial support and distribution channels.

This book provides a collection of studies in diverse European countries encompassing a plurality of rural contexts, agents, actors, processes and dynamics that relate tourism to other activities and to local development. However, the rural regions and the countries addressed in the book

– Portugal, Italy, Spain, Greece, Norway, Austria and Czech Republic – are not representative of all the diversity of rural Europe, of its potentialities and constraints. Although mainly focusing on marginal rural areas and on the contribution of tourism to local development, the perspectives seem to be different in Southern and in Northern European regions. In the first, tourism is more frequently discussed as the universal solution for rural development problems, emphasising the constraints posed by the increasing decline of the productive nature of the rural. In the second, attention is predominantly concentrated on the innovative processes and tools to foster the connections between tourism and the socioeconomic fabrics of rural areas.

Despite the diversity of conditions, originated by different socioeconomic, environmental, historical, political and cultural features and notwithstanding the plurality of forms it may take, rural tourism does exist and it is contributing to reshaping and restructuring ruralities in ways that are difficult to completely foresee. To deeply understand the connections between tourism and the broader environment in which it blooms and of which it conditions the future, further and multidisciplinary research is required, applying innovative methodologies and techniques in different rural contexts with diverse tourism development stages.

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## PART ONE

### CONCEPTS AND VISIONS: IS TOURISM PROMOTING NEW RURALITIES?



J. Oliva<sup>1</sup>  
L. Camarero

# Touristic Processes, Generic Rurality and Local Development

## Introduction

### Tourism and the rural world in economies of signs and spaces

The tourism industry has proven to be one of the most dynamic since the turn of the last century, transforming global and regional economies, regional policies and local labour markets. Its development has also been one of the most important processes in the restructuring of the rural world and its configuration as a place increasingly organised around the consumption of its signs, spaces and representations (Cloke *et al.*, 2006; Lash & Urry, 1987, 1994; Marsden, 1999; Woods, 2005). In addition, tourism has developed in the context of the growing revaluation of representations of the rural within the unfolding ideological-cultural framework of post-modernity (Harvey, 1989b), which began to emerge as a response to the crisis of 'Fordist modernisation' at the end of the 1970s. A 'neo-rustic' imaginary (Morin, 1973) associated with all areas of social life (health, food, nature, etc.).

Moreover, tourism has become an increasingly widespread social practice in industrialised countries and is considered by many individuals to be just as necessary a part of life as is the home or the automobile (World Tourism Organization, 2004). Its maturation as a mass consumer industry has stimulated a continuing diversification of touristic destinations, attractions and practices that were hardly foreseeable a few decades ago (Hall *et al.*, 2003). As a result, there has been a huge increase in tourism spaces (protected areas, residential areas, leisure and health centres, etc.), prod-

<sup>1</sup> Corresponding author, jos@unavarra.es.

ucts (landscapes, routes, gastronomy, sporting events, etc.) and narratives (place branding, rural marketing). As Perkins suggests from a broader perspective related to the process of rural commodification, this “commodification is an integral part of the re-sourcing of rural areas” (2006: 254).

Territories, regions and localities compete in this international division of the consumption of signs and places to attract tourists, investment, residents and projects. This strategy determined development models during the recent expansive economic cycle characterised by easy access to cheap credit and the emergence of rural development initiatives in the European Union. As a result, the interrelationship between tourism and rural development has both its bright spots and its negatives and must be analysed as both general process and through specific experiences if we are to draw the necessary conclusions. This is the focus of this paper.

### **Structure of this article**

In the next section we will analyse the relations, discourses and strategies that link rural tourism with development and the processes arising from the social interactions and practices that comprise the touristic experience. Following, we present the overall objectives of this text and then in a separate section, discuss the peculiarities of the Spanish case and the specific area in Spain some of our observations refer to. The methodological approach used, which hinges on the analysis of three representative processes in these relationships (social narratives, seasonal residence and sports tourism) is explained in section five. The next section discusses the main findings and results regarding each of these processes. Finally, the last section summarises the main conclusions and the issues opened up by our research

### **Post-tourism, generic rurality and development**

#### **Place branding and rural marketing**

The representations and iconography that produce *rural charm* form part of the imaginary substrate of the Western world (Girouard, 1985; Merchant, 2004; Short, 1991; Williams, 1973), but they acquire their own form in the marketing of the rural oriented toward post-modern consumer sensibilities. As Figueiredo and Raschi (2011) have shown, rural areas are promoted and marketed as reinvented tourist attractions:

This kind of reinvention may have profound effect on local contexts and identities, transforming the physiognomy of places, apparently more in accordance with urban constructs and ideal than with local values and needs (2011: 16).

And in a social reality mediated by communication processes and the consumption of experiences, their meanings flow as ideology (Goldman & Dickens, 1983) and take the form of a sort of 'generic rurality' (Oliva, 2012). We have borrowed the concept that Koolhaas (1997) applied to the contemporary city to conceptualise the impact of a spectral rurality that can be incarnated and replicated anywhere (theme parks, touristic performances, malls or restaurants, websites, etc.) and that produces spaces, goods and narratives. For example, Relph (1976), Augé (1992, 1997) and Baudrillard (1997) have shown the proliferation of thematic 'non-places' created by the tourism industry. From a more general perspective, rural commodification is analysed by Perkins (2006) as a successive transformation of new commodities (new foods, new residential areas, new tourism opportunities, etc.), which can then be formulated as spectacle and finally as simulacrum. In this context, we consider rural tourism, in contrast to other tourism, to be more sustained by the ideological. A post-rural imaginary (Hopkins, 1998) that functions as a floating and transferable signifier. As pointed out by Goldman and Dickens (1983):

It is not simply that consumer goods are linked to rural images, but rather these images are framed and presented in such a manner that a consistent ideological program is also communicated [...] This packaging of the images and value system of rural life as if they are contained in the commodity with which they are being associated we term 'the commodification of the rural myth' (1983: 585).

The very narratives oriented toward the management of territories like businesses and their commercial labelling (place branding) have functioned as an ideology for local development aimed not only at tourism or investment but also at local communities themselves. Embodied in policy makers, experts and stakeholders, these discourses have served to connect both objectives. Studies describing experiences of participatory development of these narratives or models of governance of rural tourism with stakeholders (Daugstad, 2008; Fløysand & Jakobson, 2007; Saxena & Ilbery, 2010; Sims, 2010) refer to them as paradigmatic cases far from the norm.

Place branding strategies involve thematic territorial segmentation (Burgues, 1982) based on an assessment of the rural imaginary of potential consumers. These narratives promote a reorganisation of the territory based on their objectives (e.g. the necessary infrastructure to ensure accessibility to tourist attractions). Objectified as development programmes, these discourses often operate as internal coercive powers that define priorities and investments, burying contradictions beneath supposed miraculous projects or poorly negotiated proposals (Harvey, 1989a). Their powerful appeal to politicians, policymakers and land managers during the recent decades of economic and financial boom has enhanced the effects of tourism processes.

## Sustainable development and rural tourism

Rural tourism has been raised repeatedly as a route to sustainable development, especially for those areas most suffering the problems of depopulation, isolation and lack of employment. The growth and diversification of tourism initiatives, businesses and policies aimed at tourism have certainly revitalised local economies (Hall *et al.*, 2003). For example, the LEADER I initiative in the European Union turned into a programme to promote rural tourism (Canovés *et al.*, 2006), allocating more than half of its funding to this objective (30% in the LEADER II). In 2008, 33% of tourist accommodations were in rural areas in the European Union (EU-27) (European Union, 2010).

The paradox of the potential of rural tourism is that it can transform or destroy the very resources it markets. For example, it is not always clear that tourism processes generate stable, quality local employment. As noted by Figueiredo, “instituting rural spaces into environmental and natural conservation areas can also present important constraints” (2008: 160). Diverse studies document rural tourism’s environmental costs, the problems it generates in local daily life or the differences in its acceptance among rural populations (Barque, 2004; Boissevain, 1996; Butler *et al.* 1998; Hall *et al.* 2003; Ribeiro & Marques, 2002; Roberts & Hall, 2001). At times, the policies developed to promote tourism represent a *de facto* regulation of access to certain highly valued rural areas that provides preferential treatment to some groups over others. For example, in some areas of the Spanish Pyrenees regional administrations have targeted projects to attract tourists and vacationers from the urban middle classes while at the same time limiting the projects of *neo-rural* young people to revitalise abandoned villages<sup>2</sup>. And in some Catalan counties in the Pyrenees, the new residential role of their municipalities, increasingly colonised by residents from the metropolitan area of Barcelona, has created pressure to relocate traditional farming activities.

In official documents of the European Union, sustainable tourism is associated with a multifunctional rurality, which produces food and landscapes, conserves biodiversity and creates employment (McAreevey & McDonagh, 2010). However, beyond these narratives, ‘sustainability’ means different things depending on the model implemented, the contexts

<sup>2</sup> In several towns in this area having about one hundred residents, such latent tensions have led to promoting or blocking registration by certain people because of disputes over local power. Town councils are very powerful in urban planning in Spain and the right to vote is determined by registration on the electoral roll in the place of residence. This has been used by speculators in some rural areas. In 2006, the National Statistics Institute began a thorough review of the register in municipalities having less than 2,000 inhabitants with a view to checking residents and avoiding what happened in the local elections in 1999 and 2003 when a number of cases of dubious registrations were reported in the run-up to the elections.

where it is carried out and the way its promoters interpret it (Ribeiro & Marques, 2002; Weaver, 2004). The concept of sustainability can function as both an ideology in discourses of development and as a way of developing commerce and promoting tourism. In contrast, the sense given in the concrete experiences in the governance of tourism, as political process aimed at sustainability (social, environmental and economic), has drawn less attention. Although this terminology is widely accepted and widespread in technical, political or academic discourses, its empirical realisation remains much more obscure (Sonnino, 2004). As noted by Sharpley & Roberts (2004),

the concept of sustainable tourism development as a universal blueprint for “appropriate” tourism development remains contested both generally and within the rural tourism context (2004: 121).

Strategies have emerged to make it possible to more clearly understand and evaluate the relationship between rural tourism and development. In general, these strategies call for greater effort organising the participation of different stakeholders (residents, businesses, tourists, etc.) in more integrated governance. Garrod *et al.* (2006) proposed the concept of ‘countryside capital’: A redefinition of local resources that would focus on the value chain that tourism supports and the need to promote sustainable relationships. This strategy seeks to objectify and reveal those activities that degrade the stock of this capital and identify those who invest in its maintenance. Other contributions (Cawley & Gillmor, 2008; Saxena & Ilbery, 2010) reveal the potential of models integrating social, environmental and touristic sustainability in a process of empowerment and negotiation between different local groups and stakeholders (‘Integrated Rural Tourism’).

All these issues invite us to reflect on the processes arising from the social interactions and practices that comprise the touristic experience and on the role played by the different social representations of the rural in them.

### **Rural performances, visual games and reflexivity**

Tourists and summer visitors who stay for short periods in villages taking photos, looking round, asking questions, buying local products, visiting local monuments, etc. are becoming omnipresent in rural scenarios. As tourism is adopted as a regular social practice by increasing numbers of social groups and sub-cultures, the reasons for visiting rural areas become more diverse (cultural, green, adventure tourism, etc.) and practically all rural resources (nature, rituals, identity, heritage, etc.) can be consumed by tourists. As a modern social type, tourists could be seen as people who search for ‘authenticity’ and try to overcome the dissatisfaction caused by the emptiness and artificiality of modern life (MacCannell, 1976). Bauman



found a revealing metaphor of post-modern technologies of the self in this type, which he described as «conscious and systematic seekers of experience» (1996: 29). And Coleman and Grang (2002) stated that tourists participate in a performance in which they play the part of tourists and the places visited are flows. So, for a few days, tourists seek to become ideal inhabitants of mountains, islands, a farm, etc.

several theoretical stories about tourism have relied upon a number of assumptions about places and tourist practices as relatively fixed entities [...], we need to see them as fluid and created through performance (2002: 7).

As Urry (1990) suggested, for the most part, tourism is little more than looking. He examined the characteristics of this type of 'looking' which arose during the Romantic period and has been gradually moulded and streamlined. Also stresses the transforming capacity of a look, which can lead to a place being remodelled to make it the object of mass consumption as part of the general performance. For example, farmers who take in guests say that, after the first few days, visitors often become bored. Having been socialised as viewers of the mass media, they need to be entertained. Another woman rural hotel manager interviewed by García-Ramón (1995) described how they look after their premises and the surroundings when tourists are expected so that everything looks idyllic. They do not present the everyday working place but rather prepare a stage (they sweep the street, trim the shrubs, tidy up the paths, etc.). The metaphors of 'guardians of nature' or 'gardeners of the countryside' used in the European Union reports to refer to the new roles of farmers in post-productive rurality seem to point towards this type of staging. The process of converting all those involved into actors sometimes leads tourism entrepreneurs to question the roles they are expected to play in these false utopias. As stated by the owner of a local tourism business in the Navarran mountains, "they seek a non-existent hamlet... sometimes I think they would like the village to be as it was a century ago... but we want to live in it as it is today" (Oliva & Camarero, 2002).

Rural inhabitants have learnt to cope and to adapt at times when the population of their location almost doubles. Our research has revealed the tensions and symbolic conflicts that arise in the day-to-day life of many Spanish rural locations during the summer months and other tourist seasons – queues in the shops, traffic congestion, lack of parking space, nighttime noise, etc. As stated by a local resident interviewed "They leave their car badly-parked. They block off the paths, leaving it at the entrance to your garage, on the edge of the road" (Oliva, 2004). Nogués (1996) and Crain (1996), describe the resistance of the locals to certain tourist businesses that affect their timing and spaces, sell their culture and transform their activities into tourist attractions (for example, protecting certain beaches or

woods that are known only to the locals, or holding certain rituals or festivals outside the tourist season, etc.). In some cases, however the result is different, and changes in local life symbolise the integration of the new actors in the local timing and festive events. For example, García *et al.* (1991) mention the creation in some parts of Extremadura of local festivals specifically for tourists and summer holidaymakers.

The local discourse could establish a complex set of morals regarding the way the place should be used (timing, space, etc.). The people who visit at weekends or in summer, the ‘people who come to the countryside to eat’ sometimes are seen as not respecting local customs, as crossing imaginary red lines, taking over the country that the locals work to maintain. As one local resident interviewed in other fieldwork said: “they are tourists who come for lunch, going all over the place by car. They behave as if everything in the countryside is everyone’s property” (Oliva, 2004). Some areas are carrying out a sophisticated debate on the ethics of visits, on visitors’ participation in local events or on the use being made of their resources. For example, the managers of the Orgi Nature Park in Navarre have drawn up a Declaration Guide to encourage ethical use of the park, explaining how to travel round the park and relate with the locals.

The interaction between the tourist or visitor and the host involves a complex visual game. Some authors (Daugstad, 2008; Smith, 1977; Wrobel & Long, 2001) suggest that the interaction between the locals and their visitors takes the form of a reflexive game in which neither side wins because they both make emotional investments and hold expectations that eventually restructure, erode or reinforce their identities. The tourist is described in our interviews as a person who appears in the middle of daily life and expresses an interest in the history and social meanings of the place, thus sowing a questioning attitude amongst the local residents. As stated by the owner of a tourism business in the Pyrenees in Navarra, “we often wonder how tourists see us” (Oliva & Camarero, 2002). This leads to a greater examination of identity (including territorial, cultural and figurative aspects). As a young farmer in the Navarran Pyrenees stated, “maybe we don’t know how to appreciate what we have as well as outsiders do – nature, all the wonders that surround us” (Oliva & Camarero, 2002).

## **Main Objectives**

Our work explores the interrelationships between rural tourism and local development in the context of a polarisation between productive and post-productive rurality. We analyse some of the contradictions and narratives, products and spaces these interrelationships give rise to, and the social representations with which they are interpreted by the different actors involved. We also explore how diversity, an essential element of Europe’s rural heritage that community development policies promote, may

be eroded by the success of rural marketing strategies that are shaping a 'generic rurality' closely connected to the patterns, sensibility and social imaginary of the new postmodern outlook. It is our aim to show how all these processes constitute an effective dynamic generating rural development but also contain problems and tensions that must be understood.

### **Methodology**

Our approach adapts Halfacree's (2006, 2007) triad of facets for analysing the rural – «rural localities» (related to the production or consumption of the rural); formal «representations of the rural» (developed by policymakers, planners, etc.) and everyday «lives of the rural» (subjective, diverse and not necessarily consistent with the other facets) – to the analysis of rural tourism. This model «with which to interrogate rural space» (Halfacree 2007: 128) allows us to explore three representative processes of the relationship between tourism and rural development: First, the narratives of rural marketing as ideology producing intervention models, spaces and discursive resistance; secondly, the phenomenon of second homes as an illustration of the changing representations of locality and community and finally, sports tourism as an experience tied to empty spaces, outdoor activities and nature disconnected from people – a tourism proposal that does not 'consume' the usual imaginary of rurality as a social space.

These processes have been documented in several studies conducted during the past decade across Spain (Camarero, 2009; Camarero, Sampe-dro & Oliva, 2011; Oliva, 2010; Oliva & Camarero, 2002; Oliva *et al.* 2000). Different doctoral dissertations directed by the authors have specifically dealt with the phenomenon of second homes in rural areas (Del Pino, 2012), the issue of development in the Western Pyrenean valleys of Navarre (Sanz, 2009) and sports tourism in relation to rural development (Moscoso, 2009). The quotations that illustrate the results that follow come from the fieldwork carried out in the Western Pyrenees, in the valleys of Aezkoa, Salazar & Roncal in Navarre, a pioneering zone in Spain in terms of rural tourism accommodation (country houses) and as a destination for nature or sports tourism (mountaineering, hiking,...). This fieldwork was carried out through in-depth interviews and focus groups as part of the Cross-border Project to Study the Role of Traditional Institutions in the Processes of Development of Mountain Areas, funded by the Public University of Navarre and in coordination with a parallel study conducted in France by professors F. Dascon and M.A. Granie at the University of Toulouse.

The area under study presents certain demographic characteristics common to mountain areas. There is a significant seasonality to residence and tourism, with a registered year-round population in 2012 of only 4,188 in-

habitants dispersed across approximately thirty municipalities. Population densities do not exceed 6 inhabitants per square kilometre. This population is highly masculinised and ageing, with more than 300 persons over 65 for every 100 persons under 15 years of age and the proportion of children (under 15) accounting for less than 9% of the total population. Furthermore, these valleys are a reference for Basque and Navarran identity and their agro-pastoral traditions, language, landscapes and architecture comprise a cultural heritage that reaches to the neighbouring French Basque valleys, making it an important tourist destination. Internet advertising of the country houses in the area often focuses on these images and content (nature, customs, festivals, local products, the Basque language -Euskara-, etc.) (Sanz, 2009).

The area is home to more than a dozen protected spaces (protected nature areas, bird sanctuaries and biotopes, wildlife preserves, etc.) and protected species such as bears or grouses, and more than half of the protected space in the broader region is found here. Unlike the Western Pyrenees, until recently the area had not been the site of major tourism infrastructure projects. However, the opposing positions and discourses regarding successive projects proposed for these valleys (Natural Park, Nordic Ski Centre, the reintroduction of bears) and their reach into regional political debate (in the parliament, the press, etc.) have been a constant (Sanz, 2009).

During the fieldwork in-depth interviews were carried out with politicians, young people running active tourism companies, farmers, restaurateurs and residents. In addition, three focus groups based on specific sociological profiles were conducted with participants from the three valleys. The first (G1- middle-aged men) was made up of 7 men between 33 and 50 years of age active in tourism, livestock farming and forestry. The second (G2-young people) was comprised of six young people (3 women and 3 men) between 23 and 35 years of age and employed in different sectors including public services and students. The third group (G3- middle-aged women) consisted of six women between 39 and 56 years of age that were active in hotel/restaurant businesses and public services or were housewives.

The contextualisation of the analysis in this case study has made it possible to illustrate the complex relationship of tourism with rural marketing and local development, as well as the social representations of the rural held by the different social actors involved. Mountain areas concentrate in a unique manner the signs, values and spaces that the postmodern imaginary attaches to the rural world, such as those related to the environment (nature, landscape), cultural tradition (heritage, folklore) and quality of life (health, leisure, natural foods). The diversity of proposals for the consumption and use of these areas (regarding residence, conservation, tourism, etc.) indicates the expectations many have and reveals the crossroads the processes analysed comprise for their future.

## Main Results: the production of rural tourism

### Tourism models and narratives

Conceptual systems of ‘place-branding’ and ‘rural marketing’ have exerted a powerful attraction on local and regional governments, which, in the early stages of the development of rural tourism in Spain were forced to design and implement their projects without the experience and technical resources needed. There was more emphasis placed on advertising the place and the establishment of a hitherto non-existent product than on planning and reflection. As one young respondent explained,

we have done a huge amount of advertising what we have here, but then we haven’t organised or managed anything, you know? [...] we’ve created a demand that we don’t attend to (E2, young, male, active tourism company).

Despite their strong ideological component, strategies have been presented as ‘a-political’ as formulas outside of partisan conflict and based on objective prescriptions for success. As a local mayor explained, “We don’t participate in politics [...]; we work as a business. For us this is a company, and what we do is sell our product and we sell it to anyone’. This denial of the socio-political nature of tourism and development models ignores internal contradictions in the interest of an economic goal (to sell the place) that supposedly benefits everyone and for which no dissent is recognised. The need to compete to ‘situate’ the place and market its ‘products’, thus, has a coercive function (Harvey, 1989a):

My city council has always been involved in so many problems [...] bears, the park, whatever, always a battle over something that seemed be the solution to everything, but ended up as nothing, in which the majority in favour was always right and those of us who had a different idea couldn’t say anything (G1, hotels and restaurants).

These narratives, as our interviewee said, have turned local governments into businesses oriented toward the exterior, toward regional and national political arenas, to capture projects and investments. This has had two consequences. First, the possibilities of organising processes of governance that integrate involved stakeholders in models for sustainable social, economic and environmental development have been underestimated. Secondly, the argument of the existence of international competition for the consumption of signs and places has also made collaboration difficult in early stages, as each locality has perceived itself to be engaged in a race to define and reinvent its own distinctive resources: “we recently left the Consortium of the Pyrenees [...] we think we have to first develop a local

product, a product from this area" (E1, local politician). But methodologies have led to the repeat of successful proposals, reproducing similar spaces and similar idealised discourses on rural representations:

I think there are four levels: to make a product of nature, make a sports product, a cultural product, based on our cultural heritage, and another related to quality of service [...] but our flagship product was the natural recreation area" (E1, local politician).

Strategies for identifying and developing local resources as products involve local governments acting as mediators between the sensibilities of tourism associated with the new economies of signs and space and the local reality. This requires, for example, formulating the elements that define rural referents (tradition, history, landscape, etc.) as the basis for the touristic experience: "the quality of a destination partly depends on having attractions and events that meet visitors' expectations and ensure that they are well occupied" (European Commission, 1999). Moreover, the omnipotence of the visual in post-modern societies, overshadowing everything that is not presented as spectacle, has guided rural marketing strategies – for example, the revalorisation of natural spaces (views, trails, etc.). The transformation of a place into a resource for tourism requires its preparation for the staging, organisation and interpretation of a visual performance. The process of the *museumification* of nature and of representations of the rural takes place through proposals that offer the tourist things to do, but above all to see, so that tourists can return from their trips with the images they already suspected they would see before going (Augé, 1997). The voracity of the tourist gaze (Urry, 1990) leads to a proliferation of local performances:

We are trying to create a network of museums...an ethnographic museum in [anonymized village A], a museum of the river rafts in [anonymized village B]. There is a cheese museum in [anonymized village C]. We are developing a museum project in [anonymized village D]; in [anonymized village E] there are now several museums. In [anonymized village F], there is the nature centre... and we are also working on two other museums for [anonymized village G] and [anonymized village H], which are the remaining two villages" (E1, local politician).

The process of visualising and recreating resources and products for tourism and producing the spaces for their representation, ultimately extends to the very remodelling of local public space. As explained by our interviewee,

We have worked along those lines, in creating a few reference points in the town [...], which would then boost, for example, the world of the shepherds,

and we built a monument to ranchers [...] we have another one built in the traditional form of the *espadrille*, [...] a raft built by the river" (E1, local politician).

But these narratives and models also generate resistance. Especially in areas such as the Pyrenees, where conflicting expectations converge as do many of the signs and spaces valued by new tourism economies, resulting in projects sometimes acquiring a significance beyond the local and involving social actors with their own discourses and representations of the rural (agricultural unions, tourism developers, environmental groups, historical preservation groups, etc.) (Sanz, 2009). Local dissent can be found within the tourism industry itself – “they are determined to do something to solve everything all at once” (G1-man, tourism sector) – but especially among young people: “it’s out of control” (E2, young, man, active tourism company). Young people are traditionally (self) excluded from institutional forums and are not incorporated into the political process of local development. In their representations of the rural, these actors have a clearer perception of the limitations behind these touristic narratives and models:

We need to specify what kind of tourism we want, right? In other words, mass tourism [...] or do we want a different kind of tourism where we will [...] preserve our heritage, not only nature, but also artistic, the dolmens [...] to focus tourism on a certain kind of tourism (G2-young people, student).

## Second homes and representations of rurality

Incorporating the conceptual paradigm of mobility to rural studies invalidates the sedentarist principle, which separated different categories of rural residents based on their origin. In addition to the traditional differentiation between new and old residents, there is now a new distinction between permanent and seasonal residents. The earlier dichotomy related social structure to lifestyles and both categories of residents with permanence: A binary model supported by the centrality of locality over community; in other words, in this sedentarist sociology, community membership was determined by belonging or not to the locality.

However, the accelerated process of space time compression experienced in contemporary society has revealed new forms of being neighbours not necessarily associated with continuous spatial proximity. It is in this context that we analyse the phenomenon of second homes and their importance in shaping locality.

In Spain, one out of every three homes in rural municipalities is a second home<sup>3</sup>, and the percentage of second homes as a proportion of total

<sup>3</sup> According to the 2001 census, in municipalities with fewer than 2,000 inhabitants, there were a total of 2,175,776 occupied dwellings, of which 730,046 were second homes (33.6%).

dwellings registered by the last census in 2001 in the valleys analysed in our fieldwork ranged between 17% and 40%, surpassing primary dwellings in certain municipalities (Sanz, 2009). Weekend residents who work in the regional capital and summer vacationers are typical of the sociological profiles of these homeowners. The high volume and impact of second homes is also evident elsewhere in Europe, for example in Norway, where 201 municipalities out of a total of 430 have been classified as 'rural second home municipalities'<sup>4</sup>.

Locality, in the sense proposed by Halfacree (2012), as a place shaped by spatial practices, is made up of permanent and temporary residences. In its classic conception, community was based on neighbourhood as an expression of residence and it was formed by those who resided permanently in the locality. With the spread of seasonal or temporary residences (cyclical residence), the community is no longer confined to the boundaries of the locality. Halfacree prefers the term, 'multi-residence' to indicate that the time spent in the locality is not relevant. But he goes further when he uses the term 'heterolocal' to refer to the diversity of identities in rural areas. Second home residents are not 'others' but are also rural as they develop social practices in rural areas and become producers of representations of rural life.

The incorporation of second residents into a community raises new questions about the relationship between tourism and rural development and their role in shaping current rurality. Huijbens (2012) distinguishes two types of 'second residents' in a community: Those characterised by a kinship relationship with the locality, having family and emotional as well as property ties, and those whose links to the community are characterised by lifestyle choices related to recreation and leisure. His conclusion is paradoxical: The second group, consisting of those without roots in the locality, is often more active in community activities than the first group, while those who are 'children of the locality' only passively participate in the interaction between permanent and second residents.

To analyse the relationships that different groups of residents have with the locality (based on time and ties - including generational), the conceptual triad developed by Halfacree (2007) on the production of rural space (rural localities, everyday life of the rural and formal representations of the rural) is very useful. These concepts serve to emphasise both the productive and consumer value of the locality. Permanent residents, anchored in the locality, reproduce rural life, while seasonal residents tend to consume rurality and through these experiences produce representations of rural life, such as the popular notion of the 'rural idyll'.

The work of Vepsäläinen and Pitkänen (2010) suggests that there is a mechanism of interaction between permanent and seasonal residents for

<sup>4</sup> These are rural municipalities in which there are more than 125 second homes per 1,000 inhabitants.



the production of locality. Second home residents seek to reproduce traditional lifestyles in their practices, yet it is precisely the impact and growth of second homes that forms a distinctly post-productive rurality, which is far from traditional representations. This suggests, in the context of the rural idyll, that representations of the rural produced by second home residents do revive rural lifestyles, but now no longer linked to the production or reproduction of local life but as 'styles' of consumption.

The relationship between old and new residents has also been examined in terms of conflict. For example, in our fieldwork we frequently heard expressions of antagonism among permanent residents:

those of us who have been living here, I think we care more about the reality of the valley. Those who come from outside, it makes my blood boil when I see them relaxing playing cards in the bar, and they have the right to, don't they? They have had their hard week in the factory and it's normal [...] I also do it, but if I see that they don't give a damn? (G2-young people).

Permanent residents accuse seasonal residents of having a life outside of the locality. The distance represented by the different experiences of this life tends to be expressed as if there were two different localities, although only one community:

There are two villages, we have a concept of struggle for two villages: one that's for the residents and another that responds to the needs of the person that comes from outside, who may have no roots in the village and is looking... does not have to get involved in anything, but is looking for a place, his dog, his story, his car and his nature (E1, local politician).

However, despite the appearance of conflict, there is constant interaction between permanent and seasonal residents, an interaction of experiences and representations. It is in this context that the issue of conflict between them must be explored. The above statements from residents reproduce the differences between their representations and experiences. However, analyses from Nordic countries (Hidle, Ellingsen and Cruikshank, 2010; Huijbens, 2012; Rye, 2011; Vepsäläinen and Pitkänen, 2010) show that differences in the time residing in a locality do not lead to conflict between social groups. In the words of Rye, "the myth of the second home unifies rather than divides the population" (2011: 272). In practice, local life is built on the existence of second residences, first of all, because they strengthen development. For example, Rye's studies show how rural communities consider second homes beneficial, a source of employment; at the same time, they do not feel that second homes are changing local life. Only one in six residents expressed agreement with the statement that "the second home phenomenon destroys the genuine character of my municipality" (2011: 268).

Two models of second residency have been described to refer to their social impact on an area: endemic and epidemic. The endemic model refers to second residences as a necessity for the recreational needs of urban dwellers. This serves as an urban-rural bridge as these are often second homes of families that left the locality in an earlier rural exodus or that have a specific appreciation of it. In contrast, the epidemic model is defined by volume and the effects of rapid, disproportionate growth, and where there is no link or appreciation of the locality by seasonal residents. As one local politician interviewed in our fieldwork said:

I mean, what's going to happen is that if we do a good job, our greatest fortune will be if people come. If we don't do a good job, this will turn into a second home community... where people come for the weekend, which is what is happening now, but it will be even more pronounced" (E1, local politician).

Local communities have gradually incorporated the dynamic role of the secondary residence. It is valued as an endemic phenomenon, as a bridge between rural and urban areas and a motor for local development. In the Lefebvrian sense used by Halfacree, the production of locality and rurality incorporates the experience of second home residence into rural life. In the Spanish case, recent studies (Del Pino 2012) reveal the link between first and second residences. In rural areas in the interior, second homes increase where there is also growth in first homes and vice versa; that is, the economic and social dynamism of rural areas appears to be linked to second home residence.

Furthermore, this phenomenon represents both an economic and development opportunity. Hilde, Ellingsen and Cruickshank (2010) show that second homes respond to a tradition and imaginary that is passed down from generation to generation, and are important in connecting regions and generations. For example, a recent study on second residences in Portugal (Gillot, João and Novais; 2012) shows the differential use made of the second home depending on whether the resident is a member of the first generation using the second home or the second generation. The first group uses the second home more regularly, the second group, more sporadically. These authors note that the new generations incorporate tourism into the use of the area. Other studies in Spain (Perez and Garcia, 2005) suggest the role of individuals returning to their roots in rural tourism, through the category of 'tourism of the locals'.

The question remains unanswered as to how generational change in the use of second homes contributes to the production of the representation of rural life; second residences are now a part of rural life, and second home residents have their own lifestyles that reinterpret that life.

### Nature sports and tourism without locality

Among the trends that have shaped the development of rural tourism in the last decade, the increased interest in health, sports tourism and active vacations stands out (Little, 2012). The Pyrenees have been pioneering in Spain in these initiatives. On the one hand, the dominant model of 'winter tourism' in the Western Pyrenees reproduces the mass tourism of the coastal areas, most recently incorporating additional active tourism possibilities (snowboarding, ice diving, sledding, snowmobiling, ski biking,...). The success of these experiences in Spain and in areas of the French Pyrenees has had some influence in our study area, as can be seen with the proposal for the establishment of a Nordic Ski Centre: "it is a project... shall we say., key [...] key for local development because it means [...] an investment [...] with a huge impact on everything that has to do with the valley's economy"» (E1, local politician). This project generated a conflict involving local municipal governments, civic associations and sectors of the local population in regional forums (the parliament, the press, etc.)<sup>5</sup>. The controversy was over different forms of living a rural life and the representation of the rural. While some discourses criticised the views of environmentalists or mountaineers for ignoring the economic reality of the valley or symbolic rights of its residents, other denounced a model based on economic rationalisation of the mountains.

Sporting events and adventure recreation have been developed as tourist products that make a different use of space and the representations of rurality. For example, one of the most successful events in the Pyrenees is the *Grand Prize Pirena*. A race in stages with sleds drawn by dogs through the mountains from east to west and passing through France, Spain and Andorra. Having been run over twenty times, it counts toward the European Cup and the World Cup in this speciality. These rural practices and their referents are associated with a model of elite sport that organises events as performances (spectacles) that recreate adventure or sporting effort and that offer various forms of participation as a competitor and/or spectator. Some of these, such as 'bicycle tourism races', can gather together thousands of people. As a local mayor interviewee explained,

<sup>5</sup> In 2003 the Council of Valle de Roncal drafted an initial project that was heavily criticised by environmental and mountaineering groups as well as by sectors of the local population for its effect on the Natural Reserve of Larra, in contradiction with the Regional Law on Natural spaces. The limits of the law were adapted by amending it in parliament and in 2006 the Council developed a new project with changes and improvements. The Ski Resort Valle de Roncal was inaugurated in 2008 and is part of the NORDIC-6 network formed by the resorts of Western Pyrenees in French and Spanish sides. It depends on the Navarra Regional Government and has 27 kilometers of trails for cross-country skiing and other activities.

we created a sporting event [...]. Right now, in the bicycle tourism world [...] the first division is an elite in cycling tourist races, we enter [...] with a neighbouring town [...] it is the second pass in France, [...] now our race will be the most difficult cycling tourism race in Spain, and in Europe among the most difficult. So, here we have elite cyclists, biking fans [...] and well, it is a great day (E1, local politician).

The dematerialisation of rural referents in tourism marketing makes it possible to connect different signifiers through these events in a symbolic reinvention of the past formulated as their justification. For example, the transformation of an old cattle trail into a cycling competition under the model of a bicycle rally: “we’re making another product for sports tourism, which is trip through the Roncaleses old cattle route [...] and doing it with mountain bikes, a “Californian-style” race...” (E1, local politician). As noted by our interviewee, the cycle route proposed for the ravine is inspired by the ‘Amgen Tour of California’<sup>6</sup>, an event that supports an advertising caravan promoting sporting lifestyles associated with urban professionals.

In these discourses and representations of sports tourism, place-branding and rural marketing intertwine, connecting places (Nordic skiing in the south of Europe, ‘Californian-Style’ bike races in Navarra, etc.) that do not project their local identity on the proposed sporting activity. Skiing and cycling are associated with consumption practices disconnected from identity or territorial particularities. The proposed experience is linked to a personalised relationship with nature and rural spaces that do not incorporate local opportunities and identities. Value is not placed on the cultural specificity of the territory. Sport is used to ‘delocalise’ the referents of the locality. It inspires a form of production of locality, which specifically avoids the singularity of the local.

The literature on sporting practices in connection with rural tourism is very limited. The few studies that have been done have focused on the place branding aspect. Fløisand and Jakobsen (2007) analysed the role of sport as a narrative for development. In Andalusia, a study by Moscoso (2009) addressed the practices of outdoor sports in nature. He found a significant level of conflict between practitioners of these activities and the local population – conflict both at the symbolic level of the meaning of the place and over use. Sporting activities divide local populations by causing competition over land use between ‘productivist’ groups and promoters of ‘post-productive’ uses, such as entrepreneurs of active or nature tourism. But they also lead to conflict between the promoters of sports-tourism

<sup>6</sup> *Amgen* is a biotechnology company in Conejo Valley (California). Among its flagship products is *epotin*—a synthetic version of the hormone EPO. Listed on the NASDAQ, in 2006 it began sponsoring the Tour of California one of only two cycling stage races recognised by the UCI in the United States.

activities and practitioners in the sphere of representation. While practitioners/consumers conceive of nature without a connection to local populations, those local populations view nature as a resource, for many groups as a resource that belongs to them.

Sporting practices offer us situations in which the differences in representations of the rural are extreme. In these imaginaries local populations are sometimes productive, agro-pastoral and forest areas or they represent a natural space (that supports business activities) but without territorial reference. Meanwhile, the participants in sporting activities value the area for its nature and their representations ignore local regulations. For some it is their land, for others free land. A young interviewee, the head of an active tourism company, explained in the following way access to a natural mountain reserve:

I think the entrance should be up [...], not like it is today, but just the opposite. Today it is..., you can't do organised activities, I mean, you can't go if I'm going as your guide, you can go alone, and I think it should be just the opposite... restricted, you can only enter with guides (E2, young man, active tourism company).

Sporting practices reveal in paradigmatic form the effect that representations have on tourism in natural spaces. By analogy these comments could be extended to other activities that also produce tourist spaces and localities. Attention to the difficulties of connection between representations, between different social groups, is crucial to increase the value of the tourism resources in rural areas. As stated by a young local running active tourism company:

We offer everything... in terms of outdoor activities...in the autumn visits to Irati, an indigenous forest, to Larra, a nature reserve... but not only a guided visit but with an environmental activity or something a little more elaborate. Visitors can be a typical retired person on a Sunday outing or even university biology students... In winter, of course, logically, skiing and snowshoeing is more typical. In spring, water, especially the river. And in summer, canyoning, climbing and a bit of hiking" (E2, young man, active tourism company).

Sport may be an extreme case for observing these differences, but it highlights the central role of representations in producing rural spaces. Analysis suggests that in projects to develop tourism in rural areas incorporating local identities is essential to provide natural spaces, places where there can be an enormous diversity of social practices, with a unique character. Only in this way can the area be endowed with shared meanings.

## Conclusions

Tourism has transformed rural economies, acting as a stimulus enhancing their products. In the context of the new economies of signs and spaces, the strategies of rural marketing and place branding have revitalised and multiplied the resources of rural areas through the development of new narratives and representations of rurality. However, these proposals for the development of tourism have not dealt with the problems of rural sustainability (demographic, economic and environmental). While they have managed to connect new rural tourism products to the codes and patterns of consumption of post-modern societies, this has been in exchange for selling an idealised imaginary, remodelling local time and space and exploiting the environment. The future of tourism as a model for rural development depends on its capacity to be organised based on integrated and more participatory governance, focused on the specific social realities of localities.

As we have shown, in these tourism development processes an essential role is played by the different experiences and representations of the rural, which modulate the social interactions organised by tourism. We have seen, for example, how the phenomenon of the second residence has been a means of survival for many rural areas. But we have also tried to show the rise and implications of certain touristic proposals and demands, such as sports tourism, which are linked to a rurality of empty spaces in which local identity is diminished. One of the threats that the interrelationship of tourism and rural development reveals lies precisely in its success. The enormous synergy of tourism and development in the rural areas often has as its counterpart the selling and production of a 'generic rurality' that the inhabitants do not want to experience and the tourists do not want to consume.

In the search for representations shared among inhabitants and tourists that can provide meanings that transcend consumption and support the sustainability of localities, identity plays a crucial role. The challenge will be to explore how rural identities that support these representations gradually come to be associated with lifestyles to a greater extent than with place. We cannot forget that the language of rural tourism is the language of representations.

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E. Figueiredo<sup>1</sup>  
E. Kastenholz  
J. Lima

## Recreating Rurality through Tourism – Visions of hosts and guests in two Portuguese villages

### Introduction

Rural territories all over Europe are gradually losing their traditional productive function, rendering themselves a new terrain for the urban populations' recreational and aesthetic needs and desires, transforming themselves into places of hedonic consumption. Particularly in remote or marginal rural areas, these 'consuming idylls' (Halfacree, 2006: 57) are gaining expression and consumption-oriented practices, particularly related to leisure and tourism, are taking over production-oriented activities, contributing to reconfiguration processes and to a recreated rurality. These processes also imply the redefinition of meaning of the rural, especially of the rural 'in the minds' of its inhabitants as well as of those who increasingly seem to define its destiny: the urban dwellers.

These changes occur in a context of increasingly dynamic and far-reaching global relations, which make even the most remote European village a potential spot of interest and interaction with a particular type of 'urban species': the rural tourist who frequently lives in metropolitan areas but dreams with the 'lost rural paradise'. Central elements in this paradise and at the core of its increasing consumption practices seem to be the perceived environmental and natural qualities of rural areas, their supposedly traditional and authentic cultural features, the idealized rural way of life, portraying the rural from a pastoralist perspective, therefore based on strongly positive images and feelings about the countryside. These images and feelings seem to be increasingly hegemonic and global, due to the dif-

<sup>1</sup> Corresponding author, elisa@ua.pt

fusion or certain symbols and signs of rurality which seem ever detached from the materiality of rural territories.

Rural populations themselves have progressively adopted these images and, to a certain extent, commodified the manifestations of the rural and rurality, apparently in quest of alternative sources of income, but certainly as 'mirror images' of urban perceptions. Therefore, signs and symbols of authenticity are (re)created and staged in a discourse of a rather romantic and pastoral tourism ideal, in a context of tensions between global and local, representations of the past and demands of the present. However, conflicts may arise, since urban populations confer to rural territories a meaning that is frequently not in accordance with the representations and practices of the local people even if these partially adapt to this new conceptualization of the rural to create another economic avenue for survival.

This chapter aims to debate all the above mentioned aspects, based on the analysis of the visions held by both residents and visitors of two small Portuguese villages – Janeiro de Cima and Linhares da Beira, assessed using a case-study approach and semi-structured interviews. These visions reflect distinct interests, prior experiences, meanings associated to the territory and to rurality and, naturally, imply distinct behaviours regarding rural areas, those living there and those visiting it. At the same time, however, some similarities between residents and visitors are evidenced, suggesting the globalization of the social meanings and representations of rurality as well as the commodification of the rural based on urban desires adopted and, to a certain extent, materialized by rural residents.

### **Rural areas transformations – a brief note**

In the past few decades rural areas, particularly the remote or marginal areas of Europe, have experienced major (and well documented) transformations mainly due to the loss of an important part of their productive character (Figueiredo, 2003; Oliveira Baptista, 2006; Shucksmith, *et al*, 2006). These changes, although diverse in scope and nature, according with different socioeconomic contexts, derive mainly from remarkable transformations in agriculture (Cloke, 2006; Halfacree, 2006; Figueiredo, 2003, 2008; Jollivet, 1997; Oliveira Baptista, 2006). The loss of the productive functions of rural areas rendered a new terrain to a representation and identification of the rural as a multifunctional space in which consumption-oriented activities are gaining expression.

Particularly in marginal contexts, as Marsden (1995) and Oliveira Baptista (2006) refer, the rural may be increasingly defined as being 'beyond agriculture', expression that summarizes rather well much of the post-productivism debate within rural studies, although some dimensions of these

theories might be contested (Evans, *et al.* 2002). As currently understood as 'consuming idylls' (Halfacree, 2006), rural areas seem to be nowadays the 'natural stage' for consumption-oriented practices, especially associated with tourism and leisure activities. This restructuring implies also a redefinition of the social meaning of the rural and rurality in terms of social and political representations.

In fact, the changes in rural territories originate three main narratives shaping both people's perceptions and scientific analysis (Murdoch, 2003; Halfacree, 2007; Figueiredo & Raschi, 2011, 2012), which can be summarised as:

1. Pre-modernity or 'rural crisis' discourses,
2. Productivism perspectives and
3. 'Pastoralist' or 'rural renaissance' approaches.

In the first, rural areas are perceived as less developed and backward, needing transformation and development. In the second, rural areas' images and perspectives are strongly associated with development itself, due to the modernization processes in agriculture and food production. Finally, in the third set of approaches rural areas can be understood as reserves of traditional cultural values and 'pure' nature, consequently needing to be preserved particularly for leisure and tourism activities (Figueiredo & Raschi, 2011, 2012).

Rural areas continuously acquire new functions and social meanings which render them places of/ for consumption, rather than places of production. Particularly in remote rural areas, multifunctionality seems to be a key word in the way rural areas are perceived, meaning not only a diverse set of functions but also their integration aiming at sustainable social and economic environments. In this conception, farming and related activities are still important features, combined with a variety of other activities, at the same time playing new and different roles and functions: environmental protection, landscape maintenance, preservation of cultural traditions and promotion of rural tourism (Butler & Hall, 1998; Figueiredo & Raschi, 2011, 2012). It is particularly the urban population, who tends to represent the rural mainly as nature and idyllically shaped reserve of traditional cultural features (Figueiredo, 2003, 2009), that redefines the functions and roles of rural areas. As several authors note, some features are rather central – and hegemonic – in the reconfiguration of rural territories, such as images of idealised ways of life, environmental qualities, landscape aspects, architectural characteristics and 'authentic' local food productions. These images and feelings are increasingly global and portray the rural and rurality clearly from a pastoralist perspective (Crouch, 2006; Bell, 2006; Figueiredo, 2009; Gamache *et al.* 2004; Halfacree, 2007; Murdoch, 2003; Perkins, 2006).

Therefore, despite some anti-idyllic narratives, a dominant perspective and discourse is that the rural way of life is the epitome of the 'good life', of the 'authentic' and the 'genuine', representing the antithesis of change and modernity (Halfacree, 1993, 1995; Phillips *et al.* 2001; McCarthy, 2008). These representations (and the feelings and emotions towards the rural and rurality they induce) are apparently increasingly global and hegemonic (Bell, 2006; Cloke, 2006; Figueiredo, 2003; Halfacree, 1993, 1995; McCarthy, 2008; Woods, 2007), due to the wide spread of certain types of symbols and signs of rurality that seem ever disconnected from geographical contexts and specific rural territories. These images associated mainly by urban populations to rural areas and to rurality (Butler & Hall, 1998; Figueiredo, 2003) play a central role in current rural tourism demands, offers and experiences, as discussed in the following sections.

Although pre-existing in urban cultures, these images and symbols are acquiring more relevance as the role of rural areas in production is declining and possess a decisive influence on rural areas' redefinition and reconfiguration processes which increasingly seem to be related to its 'touristification' and 'patrimonialization'. Even though commonly argued that rural territories are typically defined, by tourists, more based on imagination and nostalgia than upon knowledge of its reality as perceived and lived by its population (Figueiredo, 2003, 2009; Figueiredo & Raschi, 2011, 2012; Rodrigues *et al.* 2007), the fact is that those *global* images and symbols seem increasingly to be also part of the social representations of the local populations regarding their living spaces and the countryside as a whole.

## **New demands on the rural – the visitors and the residents perspectives**

### **The visitors' perspective**

There has, indeed, been an increasing interest in rural areas for leisure and tourism purposes from urban populations increasingly visiting it for a multiplicity of reasons (Kastenholz *et al.* 1999; Frochot, 2005; Molera & Albaladecho, 2007; Park & Yoon, 2009). Also academics, politicians and investors pay increasing attention to this trend and its associated opportunities to induce development in structurally disadvantaged rural areas, where development alternatives are needed and where simultaneously highly valued natural and cultural heritage resources abound (Ribeiro & Marques, 2002; OECD 1994; Cavaco, 1995; Sharpley, 2005; Lane, 2009).

Rural tourism is not a consensual term, though, with definitions varying from country to country, as do manifestations of rural tourism (Davidson, 1992; Lane 1994). Rural tourism may be defined very broadly as the entire tourism activity in any rural area (Keane, 1992; OECD, 1994). Some authors suggest rural tourism to be a specific tourism product or for-

mat, with some requiring the presence of agriculture (either today or in the recent past) as a central element (Cavaco, 1995; Wilson *et al.* 2001), even though agro-tourism as the best example responding to this claim is only a minor speciality product (Wilson *et al.* 2001; Clemenson & Lane, 1997). Rural tourism is sometimes highlighted as opposed to mass and resort/urban forms of tourism (Kastenholz & Sparrer, 2009; Lane, 1994; OECD, 1994; Tucker, 2003), characterized by features such as 'small scale', personalized contacts, the 'traditional character' of service elements and environments, like gastronomy or the physical 'servicescape', marked by symbols of rurality (Kastenholz & Sparrer, 2009), the presence of nature and agriculture and the existence of traditional social structures, reflected in a specific way of life, that tourists wish to discover and participate in (McCarthy, 2008; Tucker, 2003).

However, not all tourists visiting rural areas are the same nor do they seek the same (Kastenholz *et al.* 1999; Frochot, 2005; Molera & Albaladecho, 2007; Park & Yoon, 2009). Clemenson and Lane (1997) suggest that rural tourism actually refers to a series of niche activities within a larger niche activity (eg. eco-tourism, nature-tourism, farm tourism, adventure tourism, sports tourism, food and wine tourism, cultural tourism), resulting in a complex, multi-faceted activity, marked by continuously increasing diversity (Lane, 2009).

In his seminal article *What is rural tourism?*, Lane (1994) advocates that rural tourism should ideally be, apart from being located in rural areas: functionally rural (based on the rural world's special features, such as open space, natural resources and traditional practices); rural (small) in scale; traditional in character; and finally organically and slowly growing and controlled by local people. Saxena *et al.* (2007) suggest integrated rural tourism yielding sustainability as largely dependent on the development of endogenous resources and local communities, who should be empowered and subsequently involved in the tourism development process. Also from the demand side, there is a concern about sustainable rural tourism observable (Kastenholz, 2004; Ilbery *et al.* 2007), although it seems far from being a generalized perspective (Frochot, 2005; Kastenholz, 2004; Lane, 2009).

There is more consensus about the tourist experience as a most central element of tourism demand, worthwhile studying in depth and focusing upon when developing and managing tourism supply for successful product and destination development (Kastenholz *et al.* 2012a; Mossberg, 2007). Tourists seek, in fact and above all, appealing, unique and memorable experiences, shaped by prior expectations (in the present case associated with the mentioned rural idyll), by the destination's features, as well as by its broader context (e.g. hospitality of population, landscape, regional gastronomy and attractions), but also by a series of circumstantial, not controllable occurrences that may conflict with prior expectations (e.g. weather conditions, accidents). All these elements, reflecting 'a set of meanings'



will, in turn, determine the tourist's satisfaction with the destination, the image associated with it and subsequently reproduced (Lichrou *et al.* 2008). Chambers (2009) calls for significant experiences to attract and satisfy the new tourist generation, with the principles of environmental sustainability, heritage preservation, cultural diversity, and human equality being increasingly valued, corresponding to a new value orientation within society, that is also transferred to tourism consumption (Lane, 2009; Todt & Kastenholtz, 2010).

In this context, also rural tourism experiences are, apparently, increasingly sought (Ribeiro & Marques, 2002; OECD, 1994). Diverse studies on motivation and benefits sought in rural areas, in diverse destination areas (such as Kastenholtz *et al.* (1999) and later Kastenholtz (2004) studying the rural tourism market in Portugal; Frochot (2005) in Scotland; Molera & Albaladecho (2007) in South-Eastern Spain; Park & Yoon (2009) in Korea) revealed strong evidence for a dominant motivation 'to be close to nature', either for relaxation, recreational and sportive outdoor recreation, or genuine nature experience. Also an interest in socialization (with family and friends) in a distinct environment can be identified; an interest in independently exploring a region, searching novelty and broadening horizons; as well as a more romantic search of the rural idyll, including traditional culture and rural way of life, amongst some, as referred to before. The benefit segments identified in the mentioned studies additionally differ in terms of socio-demographics (age, stages within the family lifecycle), travel behaviour (both short-break and longer stays; both planned holidays and spontaneous independent trips; travelling both in summer and all year long, in both domestic and international contexts, etc.), levels of satisfaction and loyalty.

The heterogeneity of the market, its multi-motivational nature in multiple contexts leads to a large diversity of experiences that may be accommodated in a variety of local and regional rural contexts, where local actors need to engage in an innovative and integrative, sustainable product and destination development. Local tourism actors and the entire community is, in fact, a key component of the rural tourism experience provision.

Especially for those seeking the rural idyll, the personalized encounter between the local people/culture and visitors, as provided in rural accommodation units, may play a central role for the quality of the tourist experience (Tucker, 2003). In the rural accommodation context, where the term 'commercial home' (Lynch, 2005) is most appropriate, tourists frequently seek the relationship with hosts as a 'means to sharing the hosts' culture, hospitality and local knowledge'. One may consider that here hosts serve as 'cultural brokers' (Cohen, 1988), facilitating access to a more complete rural tourism product (Kastenholtz & Sparrer, 2009). However, also "negative feelings of restriction and obligation' may result from too intense social exchanges, from the point of view of the visitor,

while 'hosts themselves may experience a sense of invasion of privacy' (Tucker, 2003: 88).

However, the complex and multi-faceted rural tourism experience is neither restricted to the host-guest encounter at the lodging unit nor to the larger experience on-site. Liebman-Parinello (1993) suggests that the experience starts even before travelling and is prolonged afterwards. Here, 'imagery' and 'dreams' are crucial, since what tourists purchase are expectations of idealized experiences, with planning holidays involving fantasy, imagination and day dreaming, while the recall of the experience is also a frequently embellished discourse and shared imagination of dream-like situations (Buck, 1993).

The rural tourist experience must, thus, be understood as an increasingly sought, diversified, complex and multi-facet experience, integrating a diversity of pre-, on-site and post- experiences related to visiting the rural area, with a series of sensorial, affective, cognitive, behavioural, symbolic and social dimensions. This complex experience taking place at the rural destination is additionally shaped by multiple features of the physical and human, social, cultural and natural context, from which it demands elements that oftentimes constitute central attractors and core satisfiers, but on which it simultaneously leaves marks and impacts that need to be controlled for when aiming at sustainable rural tourism development (Kastenholz, 2006; Lane, 1994; Saxena *et al.* 2007). The 'community' and the 'hosts' are central elements in shaping this experience, simultaneously living it and being affected by it, therefore deserving particular attention.

### **The residents' perspective**

Tourism is the paradigm of the new demands and of the new functions of rural areas and it is an economic and social activity with important impacts on the local community, as extensively studied (Haralambopoulos & Pizam, 1996). It correspondingly leads to high involvement amongst residents and triggers frequently both most positive and negative attitudes, depending on a series of conditions and determinants. These attitudes consequently shape behaviours towards tourists that directly impact upon the visitors' experiences.

Doxey, for example, suggested the Irridex (irritation index) in 1975 and Butler the lifecycle model of a tourism destination, in 1980, that are widely accepted amongst scholars for explaining the attitudes and behaviours of residents regarding both tourists and tourism activities. However, empirical evidence challenges these models, suggesting that there are different types of residents within a community and, consequently, different attitudes towards tourism (Kuvan & Akan, 2005).

These different attitudes are dependent upon extrinsic and intrinsic factors (Weaver & Lawton, 2001). As Kuvan and Akan (2005: 692) note,

among the intrinsic factors, economic dependency on tourism emerges as a significant variable underlying residents' positive perceptions of the impacts and favourable attitudes towards tourism development.

Other intrinsic factors are socio-demographic characteristics of residents, such as age, gender, income, level of literacy, etc. Extrinsic aspects comprise destination features, namely the geographic location, urban or rural nature of the site and the set of characteristics which can be offered as well as local perception and use of local resources (both natural and socio-economic).

Based on the social exchange paradigm, App and Crompton (1998) and Perdue *et al.*, (1987) conclude that the perception of the outcome of tourism for a local community and also at a personal level is the most relevant factor for predicting residents' attitudes towards tourism. Generally, the impacts of tourism on local communities are divided into three main categories (Andereck *et al.*, 2005): economic, social and cultural impacts, and environmental impacts. It is to be expected that, in face of major negative economic, environmental and socio-cultural impacts, local residents will develop also negative attitudes towards tourism. On the contrary, in face of positive impacts, local inhabitants will embrace tourism activities as also positive.

As suggested before, it is frequently assumed that rural tourism may play a significant role for the development of rural communities, both due to its economic impacts and potentially large multiplier effects, and due to the positive social and cultural impacts the interaction between tourists and inhabitants may cause, namely enhancing pride and self-esteem of local populations, making them value certain traditions, landscape and heritage features (Kastenholz, 2004). This could be shown for the European Network of Village Tourism (Rodrigues *et al.* 2007). Moreover, being a transversal activity, depending on and complementing other activities, tourism necessarily interferes in the local communities' social and economic contexts at multiple levels, therefore contributing to their revitalization (Keane, 1992). In this sense, one can argue that, in general, local communities are prone to embrace in a very positive manner rural tourism initiatives.

However, in many remote rural contexts, the connection between tourism and sustainable development, in all its dimensions, has proved to be relatively faint in some areas (Cavaco, 1999; Ribeiro & Marques, 2002). This happens mainly due to the fact that the positive (and mainly economic) impacts of tourism (very often small-scale, family-based and not very professionally managed activities) on small rural communities are often limited to a few sectors or social groups, therefore not creating new and well paid jobs and not contributing to enhance the community's overall quality of life (Pato, 2012). In parallel, although tourism can contribute to enhance

the quality of life of the local population, it may also contribute to enhance social inequalities.

In terms of social and cultural impacts many authors refer to the decline in traditions, materialism, increasing crime rates, social conflicts and crowding (Brunt & Courtney, 1999, Andereck *et al.* 2005). As positive effects the improvement of services within the community, additional recreation and cultural facilities and encouragement of cultural activities and traditional arts and innovation are most referred to. Tourism may have powerful social and cultural impacts on rural contexts by inducing dramatic changes in local values, features and character. As Macnaghten and Urry (1998: 191) point out, rural tourism activities often imply

that the countryside will be increasingly consumed as spectacle. Potent images and symbols become readily transformed into saleable commodities". One of the most important consequences of this situation is "associated with the 'divorce' between the marketable qualities of the rural and its historical and social contexts, as well as to the loss of authenticity (Figueiredo, 2004: 2)

authenticity that is, however, as previously discussed, a powerful symbol in the narratives about rurality and a strong central element in the new demands on the rural.

As for environmental impacts of tourism on rural communities, it is nowadays recognized that tourism may cause significant, mainly because it often occurs in fragile environments and within a community less prepared to face its potential negative impacts. Andereck (1995) noted as major negative environmental impacts of tourism: air, water and noise pollution, wildlife destruction, damages in natural habitats and geological formations and deforestation, among others. Although local communities' residents, as noted by Andereck *et al.* (2005), seem to be positively predisposed towards tourism, they also demonstrate concerns about the impacts of tourism on their living places which should be considered when planning and developing tourism and leisure products (Williams & Lawson, 2001).

For their presence and even more important, for their expectations, claims, interests and desires, as discussed in the previous sections tourists confer to rural territories a meaning that is not, in most cases, in accordance with the representations and practices of the local people. This can lead to opposite and conflicting visions on what rural areas and rural development must be (Figueiredo, 2003, 2009). In fact, tourists and local inhabitants are quite heterogeneous categories, possessing different and often contradictory visions on rural areas, rurality and local development. As discussed in the previous sections, several studies clearly demonstrate that tourists perceived rural areas as idyllic places, mainly because of their environmental qualities and their more traditional character. The majority of the rural tourists surveyed in North Portugal (Kastenholz, 2002, 2004) clearly

demonstrate an interest in a more 'natural', 'untouched', 'unchanged' and 'authentic' rural tourism destination. The empirical evidence shows a predominance of the more global images of the rural as natural and cultural reserve, as an amenity to be preserved.

Another study conducted in the same country (Figueiredo, 2003, 2008, 2009) on the social perceptions concerning rural environment and rurality, held by visitors and inhabitants, also demonstrates that tourists strongly identify rural areas with nature. In fact, tourists seem to construct images of rurality based more on environmental and natural aspects than on social and economic aspects, therefore neglecting that rural areas are also places of life for other social actors. In this sense, this research also demonstrates the existence of conflicting visions about rural areas and rurality, as well as about the future paths of local development. For tourists and visitors, rural areas are 'desired places' that they wish to maintain relatively 'untouched' in order to experience the 'authentic' rural. For local inhabitants, rural areas are 'lived places' in which the access to equipments, services, jobs and to the features of modernity and/or 'urbanity' are still crucial aspects that, moreover, form local inhabitants' visions of progress and development.

Despite the mentioned differences between hosts and guests in rural areas, the global images and symbols referred in the previous sections attributed to the rural and rurality seem progressively to be present in the representations of rural populations concerning their living spaces and the countryside as a whole. Apparently, the rural populations themselves have started to gradually commodify the manifestations of the rural and of rurality, in quest of alternative sources of income and economic diversification. Therefore signs and symbols of authenticity are being (re)created and staged in a discourse and into practices representing a rather romantic and pastoral tourism ideal, in a context of tensions between global and local, representations of the past and demands of the present (Kastenholz & Figueiredo, 2010; McCarthy, 2008) that cannot be ignored in the rural reconfiguration debate.

## **Methodology and Case Studies**

### **Methodology**

In order to respond to the main aims presented in the first section, a case-study approach was undertaken. Although case-study research often presents some limitations, especially those related to the small number of objects analysed impeding the generalization of results to other contexts and offering limited grounds to establishing reliability of findings, it is the best approach for providing a deep understanding of a complex object, such as the diverse dimensions of the tourist experience, lived and conditioned by different stakeholders (tourists and population), and specifically

their interests, prior experiences, meanings associated to the territory and to *rurality* in a specific context (Yin, 2003). Additionally, documental analysis and on-site observation was undertaken to identify the main tourism resources of both villages and better understand the setting of the experience.

The here reported study of the visions of hosts and guests implies the analysis of several dimensions of the rural tourism experience and its determinants, namely both groups' interests, their prior experiences and the meanings attributed to the territory and to rurality. Semi-structured interviews were used to assess these dimensions. The guidelines for the interviews were based on a literature review and refined in group discussions amongst researchers integrated in the project. In Linhares da Beira, 23 tourists and 15 inhabitants were interviewed. In Janeiro de Cima, 11 residents and 9 tourists were inquired. All the interviews were tape-recorded, transcribed and the collected information was subjected to an exploratory qualitative content analysis, using NVivo and WebQDA software in order to uncover the main dimensions integrating the visions of the diverse stakeholders.

Although systematization procedures (establishment of coding frames, variables and values) were performed in the content analysis, in this chapter major emphasis will be given to the direct discourse of respondents regarding the above mentioned dimensions.

## Case Studies

The case studies analysed in this paper – the villages of Linhares da Beira and Janeiro de Cima (figure 1) – are located in the central part of Portugal. Both villages have less than 300 inhabitants and share many demographic, social and economic features with other rural settlements of the interior parts of the country. The demographic profile of these two villages is the typical one of small villages of the country's interior: a high level of population ageing and population decrease. In terms of economic activities, given the decline of agricultural activity, tourism appears as an opportunity to fight isolation, economic decline and to diversify the local economy (Fredman & Lindberg, 2008; Lima *et al* 2012).

Linhares da Beira is an old medieval village that integrates the network of *Historical Villages of Portugal* (since 1994) and is also located in the *Serra da Estrela* Natural Park. Due to its privileged natural conditions and resources for the practice of some sport, Linhares da Beira is known as the 'capital of paragliding'<sup>2</sup> and it is also integrated in a series of pedestrian and mountain biking trails (some around historical themes). Another of the main tourism attractions of Linhares is its castle. This castle was built on a huge granite massif in the mid-eleventh century, was rebuilt in 1291

<sup>2</sup> This activity is currently declining as the school of paraglide closed a few years ago.

and is today a national monument at a geographically strategic position for the country's defence. Other cultural resources are the legends of the village (especially one referring to Dona Lopa, a pious widow who lived in the village and whose soul the devil sought to steal) and several Roman buildings (graves, a Roman road and part of the Forum of Linhares), the Romanesque church (with paintings by the Portuguese master Grão Vasco), manor houses, and the Manueline pillory, as well as the restored architecture of the entire village (CMCB n/d).

*Figure 1 – Location of the Villages*



Source: Google Earth [accessed July 2011]

The village offers four active official lodging units, including a campsite and a small boutique hotel, two restaurants, a bar, a craft shop and a tourism information office. The number of visitors to the village reveals its level of attractiveness - official numbers are above 10,000 visitors a year, which is remarkable for a village of the size of Linhares, but numbers were well above 20,000 visitors between 2002 and 2004, revealing some decrease of attractiveness in the past years (AHP 2010, CMCB 2005).

Janeiro de Cima is known as the most characteristic Schist Village of the *Schist Villages Network* (the network was created in 2004). It is located by the river Zêzere and integrates a river park which is very popular in summer.

These natural conditions and resources permitted the development of a number of theme paths that go through Janeiro de Cima (Path of nature, Path of Linho, Path of Xisto and Path of the Water), paths that mix landscape, historic, ethnographic and cultural elements on foot, by biking BTT, by car, or off-road vehicles (ADXTUR, n/d). The village offers three official rural tourism units (small boutique hotels), a restaurant, two bars, a pub and the Weaver's House. The Weavers' House is an important attraction of this village – it is a thematic store where visitors can experience weaving, as well as visit the museum centre where some pieces of linen made by artisans are exposed (this attraction integrates a museum, a tea room, a craft workshop and shop). Other cultural resources are the legends of the village (especially one referring to *Januários*, related to the name of the village) and several monuments, like the main church, around which the village was formed; another church and some chapels, apart from the restored architecture of the entire village, which creates an aesthetically appealing ambience.

The local products (art crafts, linen, and agricultural products, as cherry, olive oil, chestnut) and gastronomy are also important cultural resources of Janeiro de Cima. There are no official numbers on the amount of visitors to the village, however, based on information from the parish, during weekends and the high season the population almost duplicate, mainly due to the large number of second residences.

## **Recreating Rurality through Tourism – visions of hosts and guest**

### **Visions on local features and elements of attraction**

Tourists interviewed in both villages are mainly of urban origin, with an university degree, relatively young (the majority between 34 and 55 years old) and working mainly in intellectual or scientific professions. The residents interviewed are generally older than 40 years, retired from or working in agriculture and related activities and possessing an elementary school degree (table 1).

From these characteristics it is clear that these are two rather diverse categories, whose differences may influence their visions on rural areas and rurality as well as on rural tourism and leisure activities.

Although referring local features and markers as the main motivations for visiting the villages – history and historical monuments in Linhares and the schist buildings in Janeiro de Cima – tourists also use global symbols to characterize the local territories, such as 'nature', 'green landscape', 'peace and quiet', 'gastronomy', 'silence' and 'escape from urban routine'. In fact



Table 1 – Socio-demographic profile of the interviewees

	Linhares da Beira	Janeiro de Cima
Residents	N = 15 . aged above 40 years (10) . females (8) . married (10) . low education levels (below 7 years of formal education) (8) . professionally active, usually in agriculture, or retired (6)	N= 11 . aged between 20 and 59 years . female (8) . professionally active (6) . medium education level (between 9 and 12 years of formal education) (6)
	Visitors	N = 23 . aged above 40 years or older (14) . females (13) . travelling mostly in a couple and with family (generally their children) . higher socio-economic status (doctors, nurses, teachers and economists) (14) . live in cities

the use of these symbols is more often related to ‘feelings’, ‘impressions’, ‘thoughts’ and ‘images’ they associate to the villages that are, in general, very positive and obviously corresponding to the pastoral perspective mentioned in the first section. Moreover, they relate rural contexts with the original ‘soul’ of Portugal, the ‘genuine spirit of the country. The following excerpts from the interviews regarding the visitors’ feelings and impressions of the rural contexts they visited are illustrative of this finding:

“... I think about the harmony with nature, here” (JC-T4);

“Ah... That is related mostly with the landscape, the serenity, the quietness, the... Nature, in fact...” (L-T4);

“Blue skies, green fields and free birds” (L-T12);

“The quiet sound of the river running calmly between the banks, the houses dotted with stones and the clear light of dawn” (JC-T3);

“It is the real Portugal that is still here, not a staged Portugal... it is a perfectly genuine Portugal” (JC-T2).

It is important to note that local inhabitants share the same visions, stating that their village is visited mainly due to the local attributes and labels, equally recognizing the relevance of the inclusion of Linhares da Beira in the *Historical Villages of Portugal* and of Janeiro de Cima in the *Schist Villages Network*. Residents in both villages mention the population’s hospitality as a main motivation for tourism, also emphasising the more common symbols associated to rurality, as ‘peace and quiet’, ‘landscape’ and ‘natural

elements'. Again, excerpts from the interviews allow us to better illustrate these visions:

"They come here maybe because it is a historical village. Maybe because of that... The castle, the 'manueline' churches, the 'foro'... It is a village-museum, a village -museum..." (L-P12);

"The stones... They came to see the stones [laughs]" (L-P15);

"We have here... Up there a beautiful landscape and a good water... up there high in the mountains. Here in the village ... I think all people are very welcoming" (L-P5);

"They came to visit and besides that they came for the quietness... many people say they like to come here 2 or 3 days because it is quite. They escape from the city and come to the village" (JC-P11);

"The... the... the hospitality, our hospitality... it is the main thing. Then the fact that the village is ancient and the schist..." (JC-P7).

### **Visions on rural-urban differences**

Almost the same similarity between hosts and guests is observable regarding generally perceived rural-urban differences. Tourists describe life in cities as 'stressful', 'agitated', directly opposing a more 'peaceful', 'healthy', 'pure' and 'close to nature' rural environment. Also the close social relationships that traditionally exist in small villages are emphasised as an asset of rural life, contrasting with the distant interrelations among urban inhabitants. In general, tourists, although describing urban environments as providing more opportunities (employment, culture, social services, etc.), often emphasise the negative aspects of the urban way of life, while for the countryside they do not stress negative aspects, apart for some lack of services frequently tourism related ones. Again, some excerpts of the visitors' interviews help us to illustrate the previous findings:

"In the towns and cities... we pass by people and only if we know them we say something. Here people don't... they don't know us at all and they always say 'good morning' ...it was one of the things that impressed us the most" (L-T1);

"In terms of quality of life it is completely different, isn't it? Here it is another world... But in terms of work and school conditions... It is difficult to work on agriculture... People have a hard time trying to survive from that, no?" (JC-T1);

"Yes... Yes... It is beautiful to spend some days but maybe then we... For those accustomed to another rhythm... I like the villages but I wouldn't live here" (L-T15).

Although the local population distinguishes between rural and urban contexts using similar symbols, negative aspects of rural life (hard farming work, less job opportunities, less income, isolation, etc.) are also frequently emphasised. Rural life is portrayed as 'healthier' and 'quieter', but at the same time revealing poor quality of life in terms of employment opportunities, equipments and services both for residents and tourists:

"In the city for those who work, it is better... For those that don't have studies, it is better here in the village. It is also healthier" (L-P11);

"Hmm... in the city... The movement, the quality of life... There are more opportunities and people have more 'horizons'" (L-P7);

"In the countryside, it is true that there aren't some relevant services, but there is this tranquility and relaxation... The city... It is too much movement and stress" (JC-P1);

"The bigger difference is that... in the city we have all we need, isn't it? All we need... and then... in terms of quality of life and time occupation and everything else, we live better in the village... if only we could work in the villages..." (JC-P4).

These findings express a non negligible difference between tourists and inhabitants, related to the different experiences of rural life of both categories – transitory for tourists, permanent or almost permanent for residents, as some experienced urban life through emigration in other countries or cities in Portugal. Of these many had returned after retirement, preferring to live in the village and to 'return to their origins'. Not many tourists in both villages would live in a rural area, however, despite the very positive images and feelings towards rurality. The majority prefers to live in the city because of the perceived better living conditions and job opportunities.

### **Emotions and senses – the sensorial, affective and cognitive tourist experience**

Tourists' affective appraisals were also assessed and categorized according to the affective mapping system proposed by Russel and Pratt (1980) and Russel (1988). As mentioned, all the tourists reveal affective appraisals of the villages and of the rural. Half of them mainly focus on the relaxing category (using descriptors as 'calm', 'peace', 'quiet', 'tranquillity'). The other half uses positive descriptors scattered along the arousal dimension, ranging from the use of neutral terms ('agreeable', 'pleasant') to exciting ones ('joy', 'happiness', 'interest').

Regarding sensorial appraisals (e.g. smell, sound, taste and visual), the answers reveal a pattern concurring with the affective appraisals. As mentioned, the tranquillity contrasting with urban agitation and stress is fre-

quently expressed by the use of the word 'silence' to describe rural and local sounds:

"the most agreeable sound here is silence" (JC-T2);

"it is the quietness... I think it is... we pass through the village sometimes... we cross the village and we do not hear any sound" (L-T3).

Also the 'sounds of nature', the 'sounds of the wind', the 'sounds of the water' (river) and the 'birds' are frequently associated with the rural environment in both villages:

"the sounds of the river, of the animals and the absence of other sounds. Basically it is like listening to nature and do not hear the sounds from the city" (JC-T5);

"the animals, the birds, the crickets, the wind and its effect on the trees, but mainly the birds" (L-T4).

Visitors related the villages to the scents of 'wild flowers' and 'plants'. In Janeiro the Cima the smell of 'pine trees' is often mentioned and in Linhares the scent of the 'land' and of the 'pure air' are frequently expressed:

"the scents from the countryside, the scent of the flowers, of the vegetation... it is a sensation of pure air" (JC-T8);

"the smell of pine tree and eucalyptus" (JC-T9); "the scent of the land, of the pine trees" (L-T13).

The taste is mainly related to local food products, particularly cheese in Linhares; pumpkin jam and chestnuts in Janeiro de Cima. Green is the colour more frequently associated with both villages by the large majority of tourists. Also the colours grey (Linhares) and brown (Janeiro de Cima) are frequently mentioned, corresponding to the most common stones (granite in Linhares and schist in Janeiro de Cima) used in the buildings:

"a landscape of nature, land, green... with stones, the mountains" (L-T8);

"the green fields... and the brown of the schist houses" (JC-T8).

In both villages, the tourists' cognitive image of the village tends to refer to architecture and heritage (castle, history, past, medieval, granite, schist, architecture, restored buildings). The visual dimension seems to stand out in the tourism experiences and images mainly relate to the green landscapes and fields, stones, monuments, mountains and the river. Some differences between the villages' images derive from local specificities (e.g. the river and the schist in Janeiro de Cima, the castle and the granite in Linhares), but global symbols seem to stand out in the tourists' affective, cognitive and sensorial appraisals of both villages, emphasising what we discussed earlier on the hegemonic social representations of rural areas and rurality. Although residents were not asked about these aspects, from the answers it is possible to find some similarities regarding the discourses

about the rural, particularly concerning the affective dimension, as we already mentioned in the previous sections.

### **Residents' visions on tourism and its impacts**

Local inhabitants were asked on their perceptions of the impacts of tourism in their villages. Some differences seem to emerge in the analysis between Linhares and Janeiro de Cima. In fact, the population of Linhares presents a more negative vision regarding tourism impacts, stressing mainly the unbalanced distribution of economic benefits. In parallel, many residents understand that economic impacts of tourism are sub-optimal, as most visitors are excursionists rather than tourists and the village has little services and activities to offer them:

"Benefits... normally I don't see any. Tourists could 'leave' something in the cafe or in the restaurant... If there were things to sell maybe they would buy, but there is nothing here, so... What can they buy? They don't buy anything" (L-P11);

"No, no... They do not find anything here, they arrive here and there is nothing. There is a crafts shop but sometimes it is open, other times it is closed. There is no... And currently life is not so good... People avoid to spend money these days..." (L-P12);

"We know that... those who have a 'business' are the most benefited. Formerly there was no control and one could sell a cheese, a lamb and all that... and everyone earned something. Today the only benefited from tourism are the owners of the cafe and restaurant" (L-P5).

In Janeiro de Cima, residents share a more optimistic view. Although some recognize that tourism tends to benefit persons who work in tourism related activities, the majority acknowledges the positive contributions to the entire population:

"... Tourism... everyone earns something, no? Who have an 'open door'... Everyone earns something... The people here... And... the people here they also gain some knowledge, no? The interaction and that..." (JC-P1).

The differences between the two villages regarding the perception of tourism impacts may be related to the diverse stages of tourism development in the two villages, being tourism activities much more recent in Janeiro de Cima than in Linhares and therefore generating more positive expectations towards tourism activities and visitors. Additionally, visitors stay for longer in Janeiro de Cima than in Linhares, which is easier to reach (and also get away from) and attracts a sometimes large number of passing-by excursionists.

Despite these differences, in both villages local residents consider that commercial and service offerings should be improved, particularly selling of local and agricultural products as well as providing more restaurants and more recreational, cultural and sports activities. Also the need to provide more information offices and to enlarge the opening hours of services, monuments and other attractions are recognized by a large part of the residents. Apparently they value tourists' needs over their own or, in other words, they recognize tourism as the main driving force for their village's survival.

Most of the residents in the two villages recognize the positive social impacts of tourism in the village life, mostly associated with a more dynamic, diversified and interesting social context. They recognize that tourism has brought more life to the village, that "without tourism the village would be different, everything would be 'stuck in time'" (L-P8), with the livelier atmosphere and even only a few job opportunities helping fix population that may otherwise have decided to leave (as common to this kind of remote hinterland village in Portugal). Simultaneously, the residents interviewed in Janeiro de Cima attribute more relevance to their role as hosts than the inhabitants of Linhares. In Janeiro de Cima local population seems to value more informal (i.e. not so much business-oriented as in Linhares) relationships with visitors. In fact, they value these contacts as opportunities to interact and to share experiences with different or unusual persons in their daily contexts:

"It is mainly a village with many elderly people and these persons like to feel the movement, to see new people, to say "Good Morning", to escape for a while that solitude of just being there, at their doors, catching a little bit of sun... they see people that are passing... "Good Morning"... and they have a little conversation... people here sometimes... hum... they are... hum... sometimes there is hunger, not for food, but for conversation... as I use to say, people from this village are hungry for conversation..." (JC-P1).

## **Discussion and Conclusion**

Although highly exploratory and preliminary, results from qualitative content analysis show both differences and similarities between the visions of hosts and guests regarding the villages and rural areas in general. Major differences are related to the distinction between rural and urban ways of life and main similarities concerning the presentation and description of rurality. These differences are important to recognize and understand, since individual perceptions and social representations tend to get reproduced in concrete attitudes and action, in decisions to invest time, money, efforts, correspondingly shaping development.

In fact, results reveal that rurality is, to a certain degree, subject to globalization of its corresponding social meanings and representations, leading to a corresponding commodification of the rural, according to urban expectations and desires (Figueiredo, 2003, 2009) or, as Halfacree (2006) puts it, rural 'consuming idylls', mostly related to leisure and tourism. As discourses analysed show, these idylls are mostly associated with a perfect integration of Man in Nature, with beautiful landscapes, with pure and close social relationships, with authentic, genuine ways of life (whatever this may be), with serenity, peace and quiet and the contrast to a stressful urban life, confirming results of other studies (Cawley & Gillmor, 2008; Frochot, 2005, Kastenholz & Sparrer, 2009; Kastenholz *et al.* 1999; Park & Yoon, 2009).

It is interesting to note that the definition of 'rural' is frequently formulated in contrast to 'urban', the 'village' in contrast to the 'city', 'natural' in contrast to 'artificial', 'noise' in contrast to 'silence', 'polluted' in contrast to 'unpolluted, pure and healthy', 'modern' in contrast to 'traditional'; these are all qualifiers that mirror not only a certain discourse of *urban* people regarding rurality, but a more generalized discourse of *all* regarding the rural and the urban, where representations are apparently shared through a stereotyped view of both living spaces, conceptualized as opposites. The hereby identified qualities of the 'rural' naturally imply its high perceived quality for satisfying one major tourist motivations: relaxation and escape from stress (Marques, 2009). This explains partly rural areas' appeal as tourist destinations, although an excessive focus on low arousal may not be appealing, as eventually associated to boredom, if not enriched with other kinds of experience expectations and emotions (Marques 2009, Kastenholz *et al.* 2012b), which are also increasingly sought and found in rural contexts (Frochot, 2005; Kastenholz, 2004; Lane, 2009).

The studied discourses mirror the frequently invoked new, multi-functional role attributed to rural areas and their corresponding social representations, reflecting the more consumptive perspectives of these territories regarding environmental and landscape protection, heritage preservation, frequently combined with the "tourist gaze" (Butler & Hall, 1998; Figueiredo & Raschi, 2011, 2012; Macnaghten & Urry, 1998). These perspectives typically associated to pristine nature and preserved culture and traditions, sometimes designed as the 'pastoralist perspective' of rurality (Crouch, 2006; Bell, 2006; Figueiredo, 2009; Halfacree, 2007; Perkins, 2006) are clearly present in the discourse of the urban visitors, who find rural areas attractive due to these features. However, they are simultaneously mirrored by the residents, who apparently adapt to this discourse and the visitors' expectations. Here, symbols of the 'good life', of the 'authentic', the 'natural' and 'pure' represent the antithesis of change and modernity (Halfacree, 1993, 1995; Phillips *et al.* 2001; McCarthy, 2008), the antithesis of a negatively perceived daily life in urban areas (Cawley & Gillmor 2008), as mentioned before.

The mentioned idyllic representations are connected to sensorial associations where visual cues, related to the dominating 'green' landscapes, but also traditional construction materials and nature elements shape the 'tourist gaze', scents of nature and taste of traditional food enrich the experience and sounds of nature and silence contrast with the noise and pollution associated to urban areas. Emotions invoked and reported by visitors are generally positive and rather associated to the 'relaxation' category of affective appraisal, although also some slightly arousing emotions are reported (interest, joy). These emotions may trigger memorable experiences, possibly affecting destination loyalty and place attachment, but also post-visit experience sharing with family and friends (Martin, 2010), i.e. the re-production and reinforcement of the social representations (Lichrou *et al.* 2008) of the rural idyll. Also in our data, there seems to be evidence for an, indeed, increasingly global and hegemonic image of rurality (Bell, 2006; Cloke, 2006; Figueiredo & Raschi, 2012; Halfacree, 1993, 1995; McCarthy, 2008; Woods, 2007).

Visitors, however, also reveal contradictions, when emphasizing the positive aspects of the rural life, but simultaneously admitting their preference for urban areas for living, due to their existing economic opportunities, facilities and services. They stress their admiration of rural areas as a wonderful place for a 'holiday', for a 'transitory escape' from stress, to recharge batteries and then return to their urban routines. Rural residents recognize more directly the negative facets of rural areas, although they also understand some dimensions of their life in the villages as positive. Both groups apparently cope well with what they have and try to make the best of it, while the urban visitors admit their need to escape from their daily environment, a need which is not expressed by the rural population. Residents, on the other hand, express their need to contact people, to see and talk to others, being 'hungry of conversation', which may indicate a matching of distinct needs through rural tourism, potentially benefitting both parties involved.

There is another global phenomenon visible in the discourses of both visitors and residents of the two villages studied, namely that of place branding (Blain *et al.* 2005), which helps creating distinctive place expectations. These are here associated with particular village networks, apparently enhancing place identity and attractiveness under a common umbrella, in a cooperative effort, as suggested by several authors as a most effective way of increasing marketing effectiveness and international competitiveness of small-scale rural enterprises (Cai, 2002; Cawley & Gillmor, 2008; Kastenholz *et al.* 2012a).

All these more or less global, however, thanks to place branding, slightly differentiated images, sensorial and emotion-rich associations play a central role in current rural tourism demands, but also in the place identity of rural communities, and, last but not least, in the provision of corresponding prod-



uct and experience proposals, further reinforcing these images. The tourism phenomenon does thus, undoubtedly, have an impact on the definition and development of the here studied rural communities, with impacts being perceived as mixed, economically more relevant for only a few. However, impact perceptions tend to be rather positive due to the increased dynamism perceived by residents in their otherwise quite isolated villages, with improvements of tourism supply suggested for increasing the overall economic benefits. In other words, residents seem to adhere to the perceived opportunity of enhancing village development and their quality of life through tourism, having accepted the role of serving the urban populations' desires of consuming the rural idyll (Macnaghten & Urry, 1998), since they also understand their own benefits from this exchange (App & Crompton, 1998).

Particularly, in Janeiro de Cima, where contacts, due to more extended stays, tend to be less superficial than in Linhares da Beira, these positive attitudes and expectations regarding tourism development stand out. Additionally, the fact that tourism development is more recent and of a smaller scale in Janeiro de Cima may be responsible for this more positive view towards tourism activities and visitors, the phenomenon not triggering irritation of residents yet (Doxey, 1975). In the residents' discourse the hope for new development opportunities for their villages through tourism seems to contrast with their generally negative view regarding economic and social perspectives of life in rural areas, particularly in terms of employment opportunities, equipments and services. They apparently recognize tourism as the key factor for their village's survival, understanding it thereby as one way out of the rural crisis, even if they have to adapt to needs and expectations of urban populations and stage a rural idyll that is far from the rural reality (Figueiredo, 2003, 2009; Figueiredo & Raschi, 2011, 2012), but to which residents adhere to and may identify with.

For both tourists and visitors local and global resources and symbols are relevant in their representations of rurality. Both distinctive endogenous resources and global symbols of rurality are similarly identified by both groups as main attraction factors for tourists. Rurality is represented, at the local and global levels, by all (especially by tourists) in a very positive manner, invoking positive feelings and images. These coinciding images and representations may, as a matter of fact, facilitate the co-creation of rural tourist experiences that yield satisfaction of all involved (Kastenholz *et al.* 2012a) and a more integrated and sustainable rural tourism development (Saxena *et al.* 2007). Although recognizing the relatively faint contribution of tourism to local economies, confirming other studies (Ribeiro & Marques, 2002), residents seem to view tourism as a positive facet of their otherwise socially isolated village life and as a potential, still to be developed, driving force for their villages' survival and restructuring.

Whether this expectation is justified largely depends on the local actors' capacity and willingness to engage in effective and cooperative develop-

ment and marketing of an integrated tourism supply, based on endogenous resources, eventually triggering important multiplier effects (Cai, 2002; Cawley & Gillmor, 2008; Ilbery *et al.* 2007, Kastenholtz, 2004; Kastenholtz *et al.* 2012a), but also, and not the least, on the capacity of integrating diverse interests and perspectives in the process of tourism development in the villages yielding a development, which all (or most) may identify with and engage in (Saxena *et al.* 2007).

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D. Craveiro  
I. Dias-Sardinha<sup>1</sup>  
S. Milheiras

# Industrial heritage tourism as the trigger for local development of a post-mining area in the southeast of Portugal: perception of the locals and the visitors

## Introduction

Heritage tourism has long been considered a development option that has the power to revive traditional economic activities in decline and achieve economic and social development for isolated areas with a rich heritage (Fonseca & Ramos, 2011; MacDonald & Jolliffe, 2003; Sharpley, 2002). However, previous experiences have revealed some challenging issues and the somehow limited results of this strategy. Considering that mines are frequently located in peripheral areas outside of the ordinary tourist circuits (Edwards & Llurdés i Coit, 1996), mining tourism is commonly associated with rural tourism. Despite the eventual role that heritage tourism can play in rural development, empirical evidence has shown limited results in previous experiences and there seems to be a wide gap between the rhetoric and the real benefits of rural tourism on local economies (Ribeiro & Marques, 2002).

Two main aspects are pointed out in the literature to account for the specificities and challenges of rural tourism: the integration of the offer in a wider range of local attractions (Ballesteros & Ramírez, 2007; Canalejo, 2010; Edwards & Llurdés i Coit, 1996; Hospers, 2002; Sharpley, 2002); and the need to articulate multiple stakeholders' perspectives (Ballesteros & Ramírez, 2007; Fonseca & Ramos, 2007; Koutsouris, 2009; MacDonald & Jolliffe, 2003; Sharpley & Roberts, 2004; Xie, 2006).

Our proposal addresses the latter aspect and examines the role of tourism, more precisely heritage mining tourism, as the trigger for local development of a rural post-mining area – the São Domingos Mine (SDM),

<sup>1</sup> Corresponding author, idalinasardinha@iseg.utl.pt



Portugal - by articulating the stakeholders' viewpoints about local tourism. This includes an evaluation of the site as a touristic destination by various stakeholders, and specifically by visitors and local touristic promoters, focusing on mining heritage as a way of increasing the current tourism offer.

São Domingos Mine is a relevant case study to analyze the challenges posed by industrial heritage tourism projects in rural settings due to four main reasons. First, it concerns the reality of a country where tourism is economically significant (Lew, 2011); second, SDM is an abandoned mine located in the Iberian Pyrite Belt, a vast and relevant geographical area in Europe with a cluster of projects on mining heritage tourism, some of which are now relevant industrial tourism destinations such as Rio Tinto (Spain) or Lousal (Portugal); third, SDM's geographic and socioeconomic characteristics make it a good example of the specific challenges posed to peripheral and rural areas in touristic development; and finally, the local government has pointed out how difficult it is to articulate the multiple local agents' viewpoints towards the prospects of a common strategic planning process for local development given the 40 years of abandonment of the mining site.

This work is part of the ongoing REHMINE project, which focuses on qualifying and quantifying the potential environmental, socioeconomic and cultural values generated by local environmental rehabilitation and development according to sustainable development principles.

The analysis is based on a mixed method case study research where qualitative (interviews) and quantitative (questionnaires) data sources are integrated (Creswell, 2003; Tashakkori & Teddlie, 1998; Tashakkori & Teddlie, 2003). This approach focuses on the need to consider a multiplicity of stakeholders in order to understand the potential redevelopment of a post-mining rural area. By confronting the perspectives of various stakeholders and visitors, this paper contributes to a field in need of further development within rural tourism literature (Byrd *et al.* 2009, Frochot, 2005).

First we introduce some theoretical concepts and ideas that frame and justify our approach. We then present our case study and the mixed method design applied. Subsequently, the results generated by the analysis of interviews and questionnaires are described, followed by the discussion and finally the conclusion.

## **Main theoretical framework**

### **Rural tourism and mining heritage**

Rural tourism is a concept that contains different meanings (Frochot, 2005; Sharpley & Roberts, 2004). Defined simply as "tourism that takes place in the countryside" (Lane, 1994: 9), it concerns all the aspects of tour-

ism based on the physical, social or historical dimensions of rural settlements (Frochot, 2005). At stake is what Garrod and collaborators describe as countryside capital or the “various components of the fabric of the countryside” (Garrod et al. 2006: 118). The components could be primarily natural, such as landscape, wildlife, biodiversity, geology, soils, water and air quality, streams, rivers, ponds and lakes or forests and plantations; primarily built, such as agricultural buildings, rural settlements, tracks, trails, bridleways, lanes, roads or historical features, such as historic buildings and industrial remnants; or primarily social such as distinctive local customs, languages, costumes, foods, crafts, festivals, traditions or ways of life (Garrod et al. 2006). Hence, rural tourism is related with a vast set of products, such as cultural, adventure, ecological, health or residential tourism (Fonseca & Ramos, 2007).

Heritage tourism exploits the cultural richness of a place in order to attract visitors and has been identified as a growing tourism sector with a specific market (Poria et al., 2003). It includes material, immaterial, cultural and natural assets inherited from the past and maintained in the present for the benefit of future generations (Vecco, 2010). As the awareness of the cultural value of industrial heritage slowly increases (Jasen-Verbeke, 1999), abandoned industrial sites all over Europe are being rehabilitated for recreational or touristic purposes.

Shutting down industrial sites can have significant negative consequences for the communities that were once dependent on the income they provided. The reutilization of these sites by means of exploring their cultural, historic and social values is made possible by converting the industrial heritage into a product that generates economic activities and employment, contributing to the rebuilding of the social cohesion and giving these areas and communities new perspectives (adapted from Conesa et al. 2008). This development “of touristic activities and industries on man-made sites, buildings and landscapes that originated with industrial processes from earlier periods” is condensed in the industrial heritage tourism concept (Edwards and Llundés i Coit, 1996: 342).

Old mines are an example of industrial sites where heritage stands for the identity of local communities as a symbol of a glorious past (Conesa et al. 2008). The Iberian Pyrite Belt is a relevant example due to its rich geologic resources and, subsequently, its rich mining history. In what concerns industrial attractions, Edwards and Llundés i Coit (1996: 351-553) distinguish four groups of assets frequently made available in converted mines and quarries: 1. Productive attractions, regarding the landscape marks left on the surface or underground from previous mining activity; 2. Processing activities, such as workshops or demonstrations of traditional activities; 3. Transport attractions, related with the rail, water or road transports that served the working mine; 4. Socio-cultural attractions, such as “artifacts”, “sociofacts” (about social organization practices) or “mentifacts”

(about religion, beliefs or values). Tourism development in this kind of places aims to diversify the local economy and promote local businesses, moving away from the monoculture logic of many industrial sites. The restoration of the natural environment and landscape is also a part of these initiatives (Edwards & Llurdés i Coit, 1996; Jasen-Verbeke, 1999). Along with these purposes, it is important to note that tourism development can have a protective effect on specific cultural aspects and assets. Canalejo (2010) underlines the role of these kind of initiatives on maintaining the remains of industrial work culture that would otherwise be lost. That is, these initiatives allow the valorization and regeneration of industrial heritage that would otherwise end up being abandoned until complete disappearance (Ballesteros & Ramirez, 2007).

### **Previous experiences and limited results on rural and mining tourism**

Rural tourism has long been considered a development option that can revive traditional economic activities in decline and achieve economic and social development for isolated areas (Edwards & Fernandes, 1999; MacDonald & Jolliffe, 2003; Sharpley, 2002). In fact, Canalejo (2010) has pointed out that tourism is a central element in development programs defined at European, national and local level. However, previous experiences have revealed some challenging issues.

The limited results of rural tourism have been associated with the specificities of small-scale business on which it depends (Fleischer & Felsenstein, 2000; Fonseca & Ramos, 2011; Sharpley, 2002, Sharpley & Roberts, 2004). Many individual entrepreneurs have a low level of skills, knowledge and experience, to face the difficulties when adapting to a service role in order to meet the tourists expectations (Fleischer & Felsenstein, 2000; Fonseca & Ramos, 2011; Sharpley, 2002; Sharpley & Roberts, 2004). The business's scale leads to limited economic return, which may cause dependence on subsidies and other aids to rural tourism and no relevant revenue for local inhabitants (Fleischer & Felsenstein, 2000; Sharpley, 2002). The lack of a tradition of cooperation between private and public entities can also hinder rural tourism development. This way, private investors may not be aware of the relevance of rural tourism and "from the credit institution's perspective, they are of the wrong size (too small), the wrong vintage (too new), and in the wrong location (too remote)" (Fleischer & Felsenstein, 2000: 1010).

In the specific case of heritage tourism, mining tourism initiatives results in a disappointing number of jobs created (Edwards & Llurdés i Coit, 1996; Hospers, 2002) and have a questionable impact on regional regeneration in Europe (Hospers, 2002). The peripheral location of mines carries additional challenges such as accessibility, appropriate touristic infrastructures, eventual lack of community support, and the difficulty to attract public or private investment (Fonseca & Ramos, 2011; Prideaux, 2002).

Mining tourism presents other challenges as well. In the first place, it is important to mention the vast dimension of the areas that usually require restoration and, in the case of older mines, the high level of environmental degradation that may be inherited (Conesa *et al.* 2008; Edwards & Llurdés i Coit, 1996). The high costs associated with these issues make the recovery of mines, especially the older ones, a particular challenge. Several authors refer the difficulties in raising financial support for such interventions even when there are specific EU funds available (Canalejo, 2011; Conesa *et al.* 2008; Edwards & Llurdés i Coit, 1996). Another caveat is the specificity of the touristic offer. Previous studies have shown that only a minority of the tourists that visit cultural tourism destinations are solely interested on what that attraction represents (Frochot, 2005). Plus, in most cases, mines are located far from the ordinary touristic circuits (Edwards & Llurdés i Coit, 1996: 342).

From previous experiences and despite its limited results, the reviewed literature highlighted two aspects that should be considered to promote fruitful approaches to heritage tourism. First, it is often referred the need to integrate the cultural offer in a wider range of local attractions, investing in a complementary rather than an exclusive logic as a way of diversifying the local touristic offer (Ballesteros & Ramírez, 2007; Canalejo, 2010; Edwards & Llurdés i Coit, 1996; Hospers, 2002; Sharpley, 2002). The other aspect often emphasized concerns the ability to successfully articulate the interests of the different entities, entrepreneurs or stakeholders (Ballesteros & Ramírez, 2007; Fonseca & Ramos, 2007; Koutsouris, 2009; MacDonald & Jolliffe, 2003; Sharpley & Roberts, 2004; Xie, 2006). Improving the touristic supply requires aggregating efforts, establishing networks and defining common local strategies (Fonseca & Ramos, 2007; Koutsouris, 2009; MacDonald & Jolliffe, 2003; Sharpley & Roberts, 2004).

Participative strategic planning (Healey, 1998) might be a valid approach in this context. By paying attention to and integrating different perspectives, relevant inputs can be made which resolve or prevent conflicts and misinterpretations in a development project (Healey, 1998; Koutsouris, 2009; Xie, 2006) or contribute to enhance, improve and complement the touristic offer (Sharpley & Roberts, 2004). The integration of multiple perspectives about a site and its touristic potential could also help to increase the community's sense of ownership and active intervention (Xie, 2006). In fact, the link between the community and its heritage, valued for tourism planning, is referred as a fundamental condition for the success of such initiatives (Ballesteros & Ramírez, 2007; Grimwade & Carter, 2000; Ioannides, 1995; MacDonald & Jolliffe, 2003). That is

if there is no community or mining identity, if features and cultural elements related to mining are not activated symbolically, it is highly unlikely that they will be developed successfully as a tourist resource (Ballesteros & Ramírez, 2007: 681).

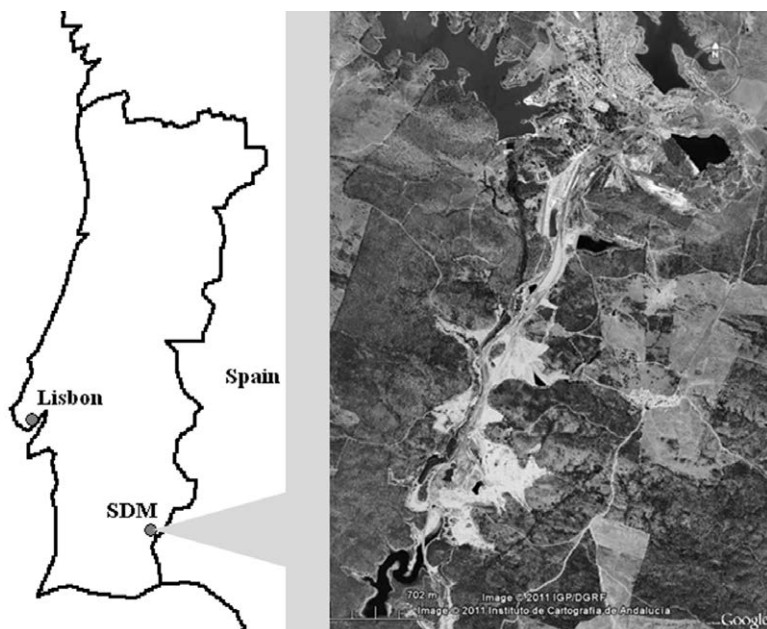
From this perspective, before proceeding with development efforts and in order to effectively reduce conflict, it is necessary to consider and understand the interests of all stakeholders (Byrd *et al.* 2009).

Several studies were carried out that explore the attitudes and perceptions of individual stakeholder groups. However, there is not sufficient empirical research concerning the confrontation of multiple stakeholder groups within a community (Byrd *et al.* 2009). In addition, further research in rural tourism literature focused on the visitor's perspective is needed (Frochot, 2005), namely on tourist satisfaction (Silva *et al.* 2010).

### **Contextualization of the research problem: the São Domingos Mine case study**

São Domingos Mine and Pomarão are villages located in Mértola, an economically depressed rural municipality in the southeast of Portugal which is one of the largest and least populated in the Alentejo region and in the country. Local inhabitants are mostly aged and unqualified and both villages sit next to a large abandoned mining area – our case study, São Domingos Mine (SDM) – that has been closed for more than 40 years but is still to this day a large unsolved environmental problem, especially due to acid mine drainage.

Figure 1 – SDM, Portugal (from Pereira, Ribeiro and Gonçalves 2004: 546 and Google Earth)



The environmental rehabilitation of the abandoned mine began a few years ago but is currently suspended with most work still to be executed, and is the responsibility of EDM, a Portuguese public company. The RE-HMINE project was created to assist the integration of the environmental rehabilitation with the larger local development interests as a way of enhancing local development by planning through a participative process.

### **Contextualizing tourism in SDM**

Regional and municipal plans account for the relevance of tourism development in SDM. In the National Program for Territorial Planning Policy (Lei 58/2007: September, 4) the conversion of abandoned mines into leisure/cultural spaces is stated as one of the strategic options for the Alentejo region. In the Regional Plan for Territorial Development (CCDRA, 2010), tourism plays an important role in the development model outlined for the territory. Finding ways to value and preserve the natural landscape and cultural heritage, or implementing a model of sustainable tourism, are among the main challenges for the region. Furthermore, when specifying the present regional touristic resources with significant potential, the industrial heritage associated with abandoned mines is mentioned as relevant. Mértola, the municipality where the SDM is located, also has its own Strategic Action Plan for Tourism (CMM, 2009). According to this document, the four distinctive local resources with the most potential for tourism are: the Guadiana River; the historic and cultural heritage (including SDM urban and industrial heritage and the water reservoirs initially created for mining purposes); the natural heritage; and the local gastronomy and traditional products. As a result, all the local actions for tourism development are connected to these four elements, which are expected to increase the quality and diversity of the touristic supply help recover the local economy.

Meanwhile, previous research on the site has indicated that leisure tourism in SDM is increasingly relevant (Carolino *et al.* 2011), especially in the summertime, when a 'fluvial' beach on the margins of a water reservoir originated by the mining operation (Tapada Grande) attracts a large number of tourists and visiting native emigrants. This beach, along with the four star hotel of the company that inherited the mining assets (La Sabina, S.A.), the several smaller rural tourism units, and the local coffees and restaurants are the main touristic services present at the SDM. There is also a small museum (*The Miner's House*) and an exhibition center, as well as plans in the short term for a greenway between SDM and Pomarão and a rowing fast track in Tapada Grande. Furthermore, several recent and ongoing projects have aimed to improve tourism in the SDM, namely its touristic strategy (Guaditer), the offer of touristic routes (Rumys), or the promotion of its industrial heritage (Atlanterra).

In terms of mining heritage tourism, and using Edwards and Llurdés i Coit (1996) terminology, SDM offers productive attractions, related with the landscape marks left by its industrial past, and socio-cultural attractions, such as the distinctive miners' houses or the industrial objects left behind from the different mining periods.

Despite the general understanding of tourism as an important part of local development, the use of industrial mining heritage as a local strength is still scarce. To address this issue we will use a plural sample of local stakeholders to learn the viewpoints on local development, and another sample of visitors (tourists and 'emigrants') and local touristic promoters to gather their opinions on SDM as a touristic destination.

### **Methodology**

For the present work we followed a sequential exploratory mixed method strategy, as defined by Creswell (2003), which has proved to be relevant in tourism studies (Mason *et al.* 2010). It consists, by definition, of a qualitative data collection followed by a quantitative one. This approach allows for the triangulation and the clarification of findings, the redefinition of research questions or the expansion of the research inquiry range in case of the identification of contradictions between methods (Tashakkori & Teddlie, 2003). For this case study, a set of semi-structured interviews was conducted to local stakeholders during the first stage and, during a second one, a questionnaire was applied to a sample of visitors (tourists and 'emigrants') and local touristic promoters of the SDM. These two methodological steps are described in the following sections.

### **Stakeholders' interviews**

To identify relevant stakeholders in the SDM development process, a snowball sample was conducted which began with a desk research for local entities and associations. This method is a non-probability sampling technique that results from asking previous subjects to nominate other stakeholders relevant to the issue under analysis (Goodman, 1961). This sampling technique identified 39 stakeholders that directly or indirectly influence or are influenced by the development of SDM. A semi-structured interview was then made in order to collect their opinions about the current situation of SDM and their expectations and wishes on how the rehabilitation and development process should be conducted. For the purposes of this article, the presented interviews analysis will focus on the way stakeholders mention the potential of regional and local tourism for local redevelopment.

The categorization of the data was done by means of a thematic content analysis as defined by Bardin (1997). Every fact, statement or idea present-

ed in an autonomous way was considered separately as a basic unit. The analysis was assisted by the MaxQDA software, exclusive for qualitative data treatment.

In the scope of the present article, a summarized version of the analysis is described, focusing on the identified relevance attributed by stakeholders to tourism as a central economic activity for the SDM redevelopment.

### **Stakeholders' sample**

The 39 relevant stakeholders identified were organized into five groups (adapted from Williams and Dair 2007): regulatory entities, interest groups, local owners, experts, and end-users. We identified 10 regulatory entities at local and regional level (related to tourism, culture, water resources, land and mining management); 5 interest groups that represent cultural and scientific interests of the site and associations focused on local development projects; 2 owners of the SDM mine perimeter - the company that owns the mining assets (La Sabina, S.A.) and a foundation (Fundação Serrão Martins) which integrates La Sabina, S.A. and the local municipality; 8 experts with privileged local or scientific information; and 14 end-users, mainly managers of local services and some users and representatives of the community groups (local associations).

### **Questionnaire to visitors and local touristic promoters**

The data collected in the qualitative phase was used to construct a questionnaire in order to assess the way visitors and local touristic promoters evaluate SDM as a touristic destination and to analyze the perceptions on regional and local tourism offer. The questionnaire considered the following sections: 1. Socio-demographic description; 2. Description of the visit; 3. Valorization of regional touristic resources; 4. Valorization of local touristic resources; 5. Evaluation of SDM as a tourist destination; 6. Comments or suggestions to improve the SDM for visitors. For this article we focus on the analysis of the three last section's results (4, 5 and 6).

The questionnaire included yes or no answers and several 5-point Likert-type answer scales that grade the level of importance or satisfaction attributed to a statement or item. The items in the questionnaire were written in both Portuguese and English to account for both Portuguese and foreign visitors. After a preliminary phase to test and adjust the questionnaire, it was applied to a sample of the mine visitors and to a sample of local touristic promoters.

Since there is no official data or estimate on the real number of tourists visiting SDM (except for the Miner's House museum), the definition of the sample was based on a diversity criteria (and not on a representative criteria). Two collaborators were instructed to administer the questionnaire to



visitors of various ages and nationalities and to diversify the localities of the interviews (near the mining pit, in the mining village, the trailer park/ area and the reservoir beach) during the seasons with a higher number of visitors to the Miner's House (carnival, Easter, summer season, and two popular local events, all in 2011). In addition to this active application, 6 passive administration spots were defined in different tourism orientated facilities (the tourist office of Mértola, the Miner's House museum, and a four star hotel, both in SDM village). Overall, the sampling spots included 2 other villages in the municipality of Mértola besides SDM (Pomarão e Corte de Pinto), representative of the geographical area of the touristic promoters' sample.

The comparison between the evaluation of SDM by visitors and local touristic promoters is based on the analyze of the responses in each sample separately using statistical description measures considering the large discrepancy of the sample sizes. Correlation tests (adequate to the ordinal level of variables) were also performed, in order to study the relation between the visit frequency, the evaluation of local tourist resources and the satisfaction with SDM visit. The data collected from both questionnaires was treated using IBM.SPSS.19 software.

### **Questionnaire sample**

The visitors sample is made up by 255 respondents who have visited or planned to visit SDM. It is essentially a Portuguese (87.1%) sample but there are foreign respondents from 11 different countries. The age of the respondents ranges between 14 and 93 years, resulting in an average age of 41 years ( $M=41.2$ ,  $SD=16.76$ ). The sample is relatively balanced in terms of gender and varied in terms of age, with a slight emphasis on respondents with less than 30 years (32.8%). Visitors tend to show higher levels of education (48.6%), are employed (59.9%), and have specialized occupations (44.4%). Most of them visit SDM at least twice a year (62.8%). Given the variability in the visit frequency, it is possible to identify local 'emigrants', individuals that have relatives or emotional ties with the mining community that return to SDM on a regular basis and actual tourists, which are defined as individuals that visit SDM for leisure or tourist purposes. The relation between the visit frequency, the evaluation of local tourist resources and the satisfaction with SDM visit is analyzed in the Results section.

The following inclusion criteria were defined to determine the universe of local touristic promoters that serve SDM visitors: all entities that offer touristic activities in SDM ( $N=7$ ), all accommodation units ( $N=5$ ) and restaurants from the two parishes ( $N=6$ ), and all cafes and bakeries localized in SDM and in the neighboring village ( $N=10$ ). Twenty eight (28) touristic promoters were identified and contacted to collaborate with the study between October and November 2011 (with the exception of two entities that

were closed during the application period). The sample collected consists of 19 promoters (67.85% of the universe considered) and it has a similar distribution in terms of activity sector (accommodation, restaurant and drinks and recreation services). The questionnaire was completed mostly by owners or managers whose qualifications are mostly basic education (66.7%) and that employ very few workers (not a single one provides more than four jobs, and only four offer more than two jobs).

## Results

### Stakeholder's perspectives: the relevance of tourism in local development

For accounting the wider aims of the research project, the content analysis of the interviews was initially done according to a predefined framework of six development dimensions identified as relevant to the sustainable development of brownfields (Dias-Sardinha *et al.* 2011): 1. Environmental reconversion; 2. Cultural revitalization; 3. Social revalorization; 4. Economic regeneration; 5. Community reinforcement; 6. Strategic reframing.

The refinement of the initial framework was done according to 14 categories that emerged from the content analysis of the 39 stakeholders' interviews. The 'Environmental reconversion' gathers 3 distinctive aspects: the mining landscape as an aesthetic feature (landscape as a space), the need to control the pollution resulting from the mining operation and its posterior abandonment (environmental quality), and the mining site as a habitat of valued endemic flora and fauna (biodiversity). The 'Cultural revitalization' dimension reports to the tangible and intangible memories related with mining (social identity legacy) and the importance given to that local mining heritage (landscape as a place). The 'Social revalorization' dimension is divided in public safety to guarantee safe conditions for tourism development on site and on local livability, mostly regarding the socioeconomic challenges associated with the neglected area. In terms of the 'Community reinforcement' dimension, the concern to include the opinions of civil society in the process (local empowerment) and the need of essential social responsibility, including transparency by institutional actors (institutional responsibilities), are the two main categories. The 'Strategic reframing' dimension is defined by 3 categories: the need to plan in an integrated format (integrated planning), the establishment of solid funding strategies (funding strategies) and the relevance of understand and value local specificities (territorial competitiveness). Finally, in the 'Economic regeneration' dimension, it is clear the central role of tourism (driving economic activity) and of other complementary activities needed for sustainable local development (multifunctional territory).

Stakeholders referred that tourism is indeed a central piece for local development when articulated with other activities and included within a broader strategy. The current touristic service supply, e.g., companies that offer guided tours, boating, canoeing, restaurants, rural inns, a four star hotel, hunting activities, natural routes and The Miner's House museum are stated as relevant. However, reference was made to some issues that require improvement such as: the creation/ improvement of touristic equipment and recreational services, a camping park, as well as a caravan park, information services, a new restaurant, a marketplace, more (and better) accessibilities and marked trails for visitors. Finally, several stakeholders also mentioned the need for investment in the connection with a nearby riverside location (Pomarão) through an old dismantled railway that was used during the mine's operation period.

### **SDM as a touristic destination: evaluation by the visitors and the local touristic promoters**

#### **Importance of SDM's touristic resources**

Visitors and local touristic promoters rated the importance of numerous characteristics of SDM site on a Likert scale (where 1=not at all important and 5=extremely important) (Table 1). The following characteristics were rated: the mining landscape, the reservoir beach, the mining village, and the community's cultural identity. In the visitors sample there is not much distinction amongst the different parameters: the most frequent answer in all items is "important", and the median of responses corresponds to the same category (Md=4). However, it should be noted that the reservoir beach is more often visited (83.6%) than the old mine perimeter (68.4%). Local touristic promoters also tend to assign most items as "important" with only a few exceptions: the mining landscape, the beach and the mining village are considered to be extremely important by this sample.

#### **Satisfaction towards the SDM's touristic offer and services**

The level of satisfaction regarding the touristic offer and services was also rated on a 5-point Likert ordinal scale (where 1=totally dissatisfied and 5=totally satisfied). Accommodation, restaurants, current condition of public spaces, accessibility to places of interest, information services, site safety, hospitality of the community and available leisure activities were considered in this section (Table 2). Both frequency and median values indicate a moderate satisfaction in regard to accommodation, restaurants, traditional product offer, public spaces conditions, hospitality and the proposed leisure activities in the tourists sample (Md=4, "Satisfied" the most frequent category). The satisfaction with the site's information services and

Table 1 – The importance attributed to SDM touristic resources.

	Visitors (N=255)				Visited (N= 29)			
	N	%	Md	SD	N	%	Md	SD
<b>Mining landscape</b>			4.00	0.65			5.00	0.83
Not at all important	0				0			
Low importance	3	1.4			0			
Neither important nor unimportant	14	6.7			4	21.1		
Important	<b>112</b>	<b>53.3</b>			4	21.1		
Extremely important	81	38.6			<b>11</b>	<b>57.9</b>		
Total	210	100			19	100		
NR	45							
<b>Water reservoir beach</b>			4.00	0.79			5.00	0.61
Not at all important	3	1.4			0			
Low importance	4	1.9			0			
Neither important nor unimportant	12	5.8			1	5.3		
Important	<b>94</b>	<b>45.4</b>			8	42.1		
Extremely important	94	45.4			<b>10</b>	<b>52.6</b>		
Total	207	100			19	100		
NR	48							
<b>Mining village</b>			4.00	0.69			5.00	0.93
Not at all important	1	0.5			0			
Low importance	1	0.5			1	5.3		
Neither important nor unimportant	22	10.7			3	15.8		
Important	<b>110</b>	<b>53.4</b>			5	26.3		
Extremely important	72	35			<b>10</b>	<b>52.6</b>		
Total	206	100			19	100		
NR	49							
<b>Community cultural identity</b>			4.00	0.83			4.00	1.18
Not at all important	2	1			<b>0</b>			
Low importance	7	3.4			4	21.1		
Neither important nor unimportant	29	14.2			1	5.3		
Important	<b>99</b>	<b>48.5</b>			6	31.6		
Extremely important	67	32.8			<b>8</b>	<b>42.1</b>		
Total	204	100			19	100		
NR	51							

Note: Frequency (N), Relative percentage (%), Median (Md), Standard Deviation (SD), Non response (NR). Part of the NR rate can be explained by the fact that in some cases (n=38) the questionnaire was applied before the first visit to SDM.

the safety in the perimeter of the old mine is slightly lower (Md=3, “Neither satisfied nor dissatisfied”). Local touristic promoters appear to be less satisfied about the SDM touristic offer and conditions. They tend to declare themselves “Unsatisfied” with the restaurant offer, the current conditions of public spaces, the accessibility to points of interests and the safety in the old mine’s perimeter; “Neither satisfied nor dissatisfied” with the traditional products offered, the information services and structures and with the leisure activities; and “Satisfied” only with the accommodation offer and the hospitality of the community towards visitors.

Table 2 – Satisfaction of SDM touristic offer and conditions.

	Visitors (N=217)				Visited (N= 29)			
	N	%	Md	SD	N	%	Md	SD
<b>Accommodation</b>								
Totally dissatisfied	2	1.0	4.00	1.01	0		4.00	0.93
Dissatisfied	16	8.0			3	15.8		
Neither satisfied nor dissatisfied	35	17.4			2	10.5		
<b>Satisfied</b>	<b>61</b>	<b>30.3</b>			<b>11</b>	<b>57.9</b>		
Totally satisfied	60	29.9			3	15.8		
Don’t know	27	13.4			0			
Total	201	100.0			19	100		
NR	16							
<b>Restaurants</b>								
Totally dissatisfied	2	1.0	4.00	0.88	3	15.8	2.00	1.20
Dissatisfied	12	5.9			7	36.8		
Neither satisfied nor dissatisfied	46	22.8			3	15.8		
<b>Satisfied</b>	<b>87</b>	<b>43.1</b>			5	26.3		
Totally satisfied	40	19.8			1	5.3		
Don’t know	15	7.4			0			
Total	202	100.0			19	100		
NR	15							
<b>The condition of public spaces</b>								
Totally dissatisfied	10	4.9	4.00	1.12	3	16.7	2.00	.91
Dissatisfied	54	26.2			8	44.4		
Neither satisfied nor dissatisfied	36	17.5			5	27.8		
<b>Satisfied</b>	<b>81</b>	<b>39.3</b>			2	11.1		
Totally satisfied	23	11.2			0			
Don’t know	2	1.0			0			
Total	206	100.0			18	100		
NR	11				1			

	Visitors (N=217)				Visited (N= 29)			
	N	%	Md	SD	N	%	Md	SD
<b>Accessibility to the points of interest</b>								
Totally dissatisfied	12	5.9	4.00	1.12	0		2.00	0.80
Dissatisfied	37	18.3			<b>10</b>	<b>58.8</b>		
Neither satisfied nor dissatisfied	41	20.3			4	23.5		
<b>Satisfied</b>	<b>83</b>	<b>41.1</b>			3	17.6		
Totally satisfied	28	13.9			0			
Don't know	1	0.5			0			
Total	202	100.0			17	100		
NR	15				2			
<b>Information structures and signs</b>								
Totally dissatisfied	13	6.4	<b>3.00</b>	1.12	0		3.00	0.84
Dissatisfied	51	25.0			<b>6</b>	<b>33.3</b>		
Neither satisfied nor dissatisfied	48	23.5			<b>6</b>	<b>33.3</b>		
<b>Satisfied</b>	<b>67</b>	<b>32.8</b>			<b>6</b>	<b>33.3</b>		
Totally satisfied	21	10.3			<b>0</b>			
Don't know	4	2.0			18	100		
Total	204	100.0			1			
NR	13							
<b>Security of the mine perimeter</b>								
Totally dissatisfied	12	5.9	<b>3.00</b>	1.11	<b>6</b>	<b>35.3</b>	2.00	0.87
Dissatisfied	44	21.8			5	29.4		
Neither satisfied nor dissatisfied	45	22.3			<b>6</b>	<b>35.3</b>		
<b>Satisfied</b>	<b>70</b>	<b>34.7</b>			<b>0</b>			
Totally satisfied	21	10.4			<b>0</b>			
Don't know	10	5.0			0			
Total	202	100.0			17	100.0		
NR	15				2			
<b>Leisure activities</b>								
Totally dissatisfied	9	4.5	4.00	1.02	2	11.8	3.00	1.01
Dissatisfied	16	8.0			4	23.5		
Neither satisfied nor dissatisfied	52	25.9			<b>6</b>	<b>35.3</b>		
<b>Satisfied</b>	<b>77</b>	<b>38.3</b>			5	29.4		
Totally satisfied	28	13.9			0			
Don't know	19	9.5			0			
Total	201	100.0			17	100.0		
NR	16				2			

Note: Frequency (N), Relative percentage (%), Median (Md), Standard Deviation (SD), Non response (NR). Only the respondents that already had already visited SDM were considered (N=217).

Visitors were asked two additional questions: their overall evaluation of SDM and suggestions on how to improve it as a touristic destination. In general the assessment is mostly positive: most visitors are satisfied (40.0%) or completely satisfied with their visit to SDM (45.0%). Plus, some 98.8% of the sample plan to return to SDM and would recommend it to friends as an enjoyable experience.

Approximately 44% of the respondents that visited SDM left their suggestions and commentaries. Most of the suggestions concern the improvement of the services currently available to tourists (38.9%) (e.g., better restaurants, greater variety of recreational activities, alternative solutions for accommodation – camping park); the availability of information (35.8%) (e.g., more touristic promotion, more local guides, maps and detailed itineraries, information signs in the trails, and information in English); and the social and urban conditions of the village (35.8%) (e.g., roadway maintenance, cleaning and upkeep of public spaces, better lighting, and the establishment of a pharmacy). On a smaller scale, visitors also suggested the following improvements: the maintenance and promotion of the mining heritage (29.5%), a strategy for local and touristic development (21.1%), the maintenance of the beach (13.7%) and a few other issues, such as better accessibility to the village and places of interest, user awareness for the maintenance of public spaces, and a general reference for the need to protect the site's uniqueness.

### **Visitors' perceptions and the familiarity with the place**

The visitors sample characterization revealed a high number of frequent visits, indicating a high familiarity with the place and the existence of family and emotional ties. Some association tests were applied in order to understand how this familiarity can influence the evaluation of the local tourist resources and the level of satisfaction of the visit. Correlation coefficients (Spearman Coefficients,  $\rho$ , Table 3) between the visit frequency and the evaluation of SDM tourist resources variables were calculated. If some reached statistical significance ( $p < 0.05$ ) their magnitude are too low to be considered relevant. The data suggests that there's not a relevant association between familiarity, the evaluation of local tourist resources and the tourist satisfaction.

The visit frequency, however, appears to be correlated with the level of tourist satisfaction (Table 4). There is a negative correlation between the visit frequency and the evaluation of the cleanness ( $\rho = -.35$ ,  $p = .00$ ) and condition of public spaces ( $\rho = -.422$ ,  $p = .000$ ), the accessibility to places of interest ( $\rho = -.266$ ,  $p = .000$ ) and the site's safety ( $\rho = .257$ ,  $p = .000$ ). In all cases, the higher the visit frequency, the less satisfied the visitors, perhaps due to the negative perception towards the inconsistent local investment made in tourism development as expressed in the stakeholders' interviews.

Table 3 – Correlation coefficients between Frequency of visit and the importance attributed to SDM touristic resources.

SDM tourist resource	N	Coefficiente	p
Mining landscape	208	.163	.019*
Water reservoir beach	205	.177	.011*
Mining village	204	.133	.057
Community cultural identity	202	.048	.496

Note: Frequency (N), Spearman coefficient between Frequency of visit variable (None – first visit; 2 times a year; more than 2 times a year) and the Importance of SDM tourist resources variables. \*p<.05.

Table 4 – Correlation coefficients between Frequency of visit and the satisfaction of SDM touristic offer.

SDM tourist offer	N	Coefficient	p
Accommodation	173	-.056	.465
Restaurants	186	-.068	.353
The condition of public spaces	202	-.350	.000*
Accessibility to the points of interest	217	-.266	.000*
Information structures and signs	196	-.119	.096
Security of the mine perimeter	191	-.257	.000*
Leisure activities	181	-.104	.163

Note: Frequency (N), Spearman coefficient between Frequency of visit variable (None – first visit; 2 times a year; more than 2 times a year) and the Satisfaction of SDM tourist offer variables; \*p<.05.

## Discussion

This paper analyzes the role of tourism, especially industrial heritage tourism, as the trigger for local development of a rural post-mining area and its perception by multiple actors. Specifically, we learned about the quality and potential of its touristic offer by considering the manner in which tourism is understood in the stakeholders' speech on local development and by the evaluation of SDM as a tourist destination from both the demand side (the visitors sample) and the supply side (the touristic promoters sample, i.e., the locals) perspectives.

Tourism is viewed by national and local development policymakers, and by SDM stakeholders in particular, as the most relevant economic activity for the future development of SDM. In sum, the potential use of the social-cultural mining identity, mining landscape and former mining complex legacies (including the water reservoirs) are considered as the most promising elements for local development. There is a consensus that, if in-



cluded within a diversified touristic product offer, heritage mining tourism can have a positive contribution towards local development.

Nevertheless, respondents are aware of the scarce conditions for the reception of visitors in SDM and the need to ensure a better answer to their interests. In general, visitors are more satisfied than local touristic promoters but both agree on the need for better touristic services in what concerns accommodation, restaurants, activities, and information services.

Because all local resources received approximate evaluation scores, we are unable to understand which touristic resources are considered to be the most relevant by the visitors. Still, the reservoir beach is visited more often than the old mine perimeter. Therefore, and considering that beach or leisure tourism is generally more popular than cultural tourism (Frochot, 2005), heritage tourism in SDM may be a positive factor for the diversification of the present beach tourism offer, which would fit the findings of other authors (Ballesteros & Ramírez, 2007; Canalejo, 2010; Edwards & Llurdés i Coit, 1996; Hospers, 2002; Sharpley, 2002).

At the present time, it is already possible for tourists to enjoy the impact of the past mining activity in the landscape (productive attraction), and to enter into contact with some artifacts and sociofacts of the SDM community (social-cultural attractions) by visiting the small local museum (The Miner's House museum) and exhibition center. In addition to improving these offers, it is also possible to take advantage of the local mining heritage to develop new products related to the processing (such as workshops that demonstrate traditional activities and the community way of life).

A large sample of local stakeholders considered that tourism is an important activity for local development. Hence, the general acceptance by the community, a condition frequently pointed out as a prerequisite for the success of these kind of initiatives (Ballesteros & Ramírez, 2007; Grimwade & Carter, 2000; Ioannides, 1995; MacDonald & Jolliffe, 2003), appears to already be fulfilled in SDM. Also, by crossing the perspectives of both visitors and touristic promoters about local resources and conditions for welcoming tourists, it is possible to highlight mining heritage tourism as a valued factor of diversification and identify areas that are in greater need of improvement by taking into account tourist satisfaction – an element which is very much valued by national tourism entrepreneurs in the business (Silva *et al.* 2010).

Nevertheless, the study also revealed that SDM faces the common challenges of peripheral destinations where the impact of tourism is constrained by deficiencies in infrastructures and services (Nash & Martin, 2003), by low education levels of local touristic promoters (Fleischer & Felsenstein, 2000), by the few jobs that the sector actually provides (Hospers, 2002), and by limited financial resources for local improvements (Canalejo, 2010, Edwards & Llurdés i Coit, 1996; Conesa *et al.* 2008). On the bright side, the

small number of local touristic promoters and the proximity between them ("everybody knows everybody else" and some share family ties) can be used as an advantage to locally develop specific products, as in other localities where these conditions are observed (Saxena, 2006).

The visitors sample includes many frequent visitors that seem to be less satisfied with the conditions offered at SDM. The personal link to a place has been shown to have a positive effect on tourist satisfaction (Devesa *et al.* 2010), but it has the opposite effect in the SDM case. This finding can be explained by the feelings expressed by stakeholders regarding the lack of consistent action on site. Also, this familiarity allows visitors to develop a greater critical sense of what can be done in SDM mining site.

Without disregarding the overall positive evaluation by visitors and satisfaction with SDM as a tourist destination, and the relevance given by all stakeholders to tourism as the main trigger for local SDM development, previous experiences in tourism have indicated that it is important to consider the eventual negative social impacts that this economic activity can have locally (Tovar & Lockwood, 2008). These issues are not considered by the stakeholders and might be relevant for analysis in further research.

Some considerations must be made regarding the limitations of the present study, especially in what concerns the sampling procedures. First of all, the snowball procedure allowed us to approach a diverse set of local actors comprised essentially by local groups, such as entities and associations. Therefore, this sample may not necessarily represent the interests of the general population, such as housewives, students, or the elderly who do not participate or identify themselves with these actors. Secondly, the definition of touristic promoters used in the study could also be geographically broader, for instance, at municipal or regional levels. And finally, the inexistence of previous relevant quantitative data on visitors and the broad scope of the site under analysis do not allow us to assess the sample representativeness. The difference in size of the compared samples may also be a handicap when comparing the viewpoints of the visitors and local touristic promoters.

We believe, nonetheless, that our work has produced relevant knowledge about the role of tourism as a trigger for local development of the SDM and that it contributes to this research field by demonstrating the benefits that can be obtained through analyzing the articulation of multiple perspectives and types of information.

## **Conclusion**

This work focused on the potential role of tourism for the post-mining development of the SDM area. This was done by using an approach poorly documented in the scientific literature, i.e., comparing and articulating so-

cial actors' multiple perspectives about a touristic destination. By comparing the statements of both visitors and touristic promoters, as well as local stakeholders, it was possible to identify what is perceived as most relevant for the enhancement of SDM as a touristic destination, namely, to expand the offer of touristic services in specific domains. Hopefully, this will allow the strengthening of heritage mining tourism as a valued element of a diversified tourism (placed together with other typologies such as beach and leisure tourism) and as part of a regional development strategy that relies on tourism as a relevant sector for rural development.

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G. Belletti  
G. Brunori<sup>1</sup>  
A. Marescotti  
G. Berti  
M. Rovai

## Is rural tourism sustainable? A reflection based on the concept of 'rural tourism configurations'

### Introduction: rural tourism and sustainability

Along with the restructuring of rural areas occurred in the last decades, (Marsden, 1998) the societal perception of the countryside has changed from an image of undifferentiated space for food production (Lowe *et al.*, 1993; Murdoch and Ward, 1997) to diversified space performing multiple functions - residential, landscape, environment, historical and cultural memory (Basile and Cecchi, 2001; Van der Ploeg and Roep, 2003; Belletti *et al.*, 2003; Brunori, 2006).

Thanks also to the growth of a tourism demand looking to alternatives to mass-tourism, and more sensitive to the values of nature and culture, the rural has become a consumption place. For rural areas, this implies the opening of new economic opportunities, the impact of which should be carefully considered, especially where the phenomenon has been growing strong and fast, as happened in Tuscany.

According to the classification proposed within the tourism economics, rural areas are community-type destinations (Franch, 2010). Unlike what happens in corporate-like destinations – such as large resorts or amusement parks – with community-type destinations the territory as a whole can be considered as a 'tourist product', composed of a plurality of natural and manmade attractions, organized by a plurality of largely independent actors.

The potential of the product-territory is thus the result of a complex dynamic of cooperation and competition between firms, often actively supported by local governments. The collective dimension of rural tourism is

<sup>1</sup> Corresponding author, gbrunori@agr.unipi.it

not just about the construction of the tourism product, but also the preservation and reproduction of territorial capital on which it is based. In fact, tourism can also contribute to maintaining the landscape, environment, farmland, traditional buildings and hydraulic infrastructure, social fabric, culture and traditions. Territorial capital, articulated into its natural, social, human, cultural, institutional, economic, symbolic dimensions (Berti, 2009; Milone et al, 2010), is mainly a public good (Zamagni, 2007), the management of which requires local actors' involvement and coordination (Ostrom, 1990; Brunori and Rossi, 2000).

The support to rural tourism is now a pillar of rural development policies. However, especially in areas where tourist flows are high, rural tourism can generate pressure on rural resources and on the quality of life of rural population, undermining economic sustainability in the medium to long term. This is especially true in areas where territorial resources are getting more vulnerable for the restructuring of the farming sector and for the demand of land for non-agricultural use. Where the agricultural sector reduces its weight on rural areas and weakens its identity while the number of tourists grows, the problem of carrying capacity of rural areas and the possible erosion of the various types of territorial capital could emerge.

The development of rural tourism and its integration in the global tourism circuits has led to the spread of globalized patterns of use of rural territorial resources. This is likely to generate both opportunities and conflicts at local level. The transformation of the countryside into a space of consumption results in a restructuring of the countryside and of life in rural areas, with outcomes that may be quite different from the recent past. Tensions between the 'tourism industry' and the 'rural system' may be emphasized, especially when, at local level, strategies based on tourism monoculture are adopted. Indeed, these strategies can exert negative effects on the environment (congestion and erosion), the social sphere (loss of cultural identity) and the economic sphere (exploitation and rent). The role of external actors, active not only on the demand side but also on the supply side as in the case of investments by specialized tourism entrepreneurs, becomes a critical point.

### **Analyzing rural tourism by means of 'tourist configurations'**

To analyse the dual significance of tourism, both as resource user and resource producer, it is necessary to explore in depth the relationship between territorial capital, actors and strategies within the territories.

The supply of rural tourism aims at transforming a set of resources and characteristics (productive, environmental, and cultural), typical of the rural world and its atmosphere, into products for the market. As emphasized by Cawley and Gillmor (2008), rural tourism depends on a wide

range of private, collective and public resources (natural, cultural, infra-structural, organizational) that – organized and translated into symbolic capital – are projected outwards to become elements of attraction for tourists. On this regard, the ability of the actors, both local and non-local, to mobilize these resources through the activation of networks of integration, collaboration and cooperation both internally and with the outside is crucial, as it can be the driver for the construction of a specific and territorially differentiated supply.

We use the concept of 'tourist configuration' (Belletti and Berti, 2011)<sup>2</sup> to analyse the mode of organization of the community-type tourist supply. Referring to the concept of territorial capital and to the metaphor of the network (Dredge, 2006), a 'rural tourist configuration' can be defined as:

a coordinated system of networks between local and non-local actors (businesses, visitors, institutions, communities etc.) interwoven with reference to a specific rural area, that mobilizes according to a collective logic a set of specific local resources (cultural, human, environmental, social, economic, institutional, symbolic), with the aim to enhance their value by means of their incorporation in a tourist supply; the integration of these resources defines a specific rural tourism product in its material and immaterial component and its symbolic projection.

In the same area different tourist configurations, being expression of different networks of local and extra-local actors, may live together, sharing the same rural space and a common pool of local resources. These co-existing configurations may bring about different views and interests, or vice versa develop synergies enhancing the overall health and image of the territory.

By means of the concept of 'tourist configuration', this paper aims to analyse the dynamic relationships between local and extra-local actors, their networks and territorial capital, in order to explore the issue of sustainability. According to Saxena *et al.* (2007), the sustainability of tourism is based on the awareness by local actors of an explicit link with the rural territorial capital, and their ability to manage this link in the tourism development (individual and collective/territorial) strategies. Therefore the key criteria by which analyse rural tourism configurations are those of grounding, empowerment and endogeneity (see Table 1).

This paper builds on the results of a research, based on a participated approach, on two rural areas in Tuscany, the area of Montaione municipal-

<sup>2</sup> For a discussion on the relationship between the concept of *tourist configuration* and the concepts of *tourist destination* (European Commission, 2000) and *local tourism system* (Rispoli and Tamma, 1995) see Belletti and Berti (2011).



ity and the area of the Park of Foreste Casentinesi (see Pacciani, 2011, for the general results of this research). Through interviews and focus groups with local key-actors, the local system of supply and demand for tourism has been analysed and local configurations of rural tourism have been identified, in order to discuss features and issues.

*Table 1 – The binary nature of the configurations of rural tourism*

<p><b>Grounding</b> Grounded configurations are built around local actors and relationships, but do not foreclose to innovation and external knowledge.</p>	<p><b>Eradication</b> Uprooted configurations are built around external actors and relationships. They can facilitate access to external markets, but without adequate systems of rules and controls are likely to disconnect local resources from the local context (loss of its distinctive features resulting from the territory) and disperse the added value produced locally.</p>
<p><b>Endogeneity</b> Endogenous configurations center their strategies upon the value of local resources and on their reproduction.</p>	<p><b>Exogeneity</b> Exogenous configurations incorporate monetary and human resources of external origin. They provide channels to carry local interests within the general agendas. However, if they are not able to connect to the local socio-economic structures, they can make tourist configurations vulnerable to external shocks and may generate conflicts and tensions within the local system.</p>
<p><b>Empowerment</b> Empowering Configurations facilitate local participation in managing physical, cultural and economic resources, developing local skills and abilities.</p>	<p><b>Weakening (local actors)</b> Weakening configurations are dominated by local elites, often dominated by external agendas. They prevent from establishing ownership by the local community.</p>

Source: adapted from Saxena *et al.* (2007, p. 353)

### **Exogenous or endogenous: the case of Montaione**

Montaione is a small municipality in the province of Florence. It is the most important rural tourist destination of Tuscany, with about 300.000 visitors/days per year. There are two main features that make Montaione attractive for tourism. The first one is its unique rural environment: Montaione is a typical Tuscan countryside, with hills, cypresses, olive trees, rural houses. People can get here and relax in a quiet and beautiful green place. The second one is its proximity to Tuscan art towns: tourists can sleep here and then quickly move by car to visit Florence, Siena, Pisa with about one hour trip.

But there are specific reasons that made Montaione the rural tourism capital, and these reasons date back to the '70s. During the period 1951-1981 the area was subject to rural depopulation as well as many other rural areas in Tuscany: population of Montaione dropped from 5890 to 3426 inhabitants. In 1951, 83% of active workers were employed in agriculture, while in 1981 they were 16,8%. Depopulation caused a drop in land and rural buildings value, which attracted the interest of urban people. This was the beginning of 'rural renaissance' of Tuscany. In 1974, a Swiss multinational firm bought and restructured an ancient abandoned village, Tonda, and transformed it into a tourist resort. It was one of the first foreign investments in the rural countryside for tourist purposes. As a result, Montaione became well known outside Italy, and many investors, including foreigners, began to look at the enormous number of abandoned buildings as business opportunities.

Consequently, tourism became the core of the development strategy of the area much earlier than in other places. In 1985, apart from the 45 apartments in Tonda, there was only a hotel with 9 bedrooms. By 1995, 100 rural houses had been restructured, and in that year 160.000 visitor/days were registered. Tourism reverted the trend to depopulation (+7% between 2001 and 2007) and to economic decline (unemployment rate is lower than Tuscan average).

Local municipality has strongly supported tourism development, considered a strategic priority. It has encouraged the transformation of agricultural land and buildings into tourist infrastructures, and supported the restoring of the historical centre of the town as well as the old rural pathways. Well before a regional regulation on agri-tourism, the municipality has issued a municipal regulation on rural houses. It has also established a tourist office and participated to national and international fairs to promote the place.

In the light of this particular economic development, Montaione over time has consolidated a number of tourist configurations. The one that gives Montaione its recognition outside Italy is the Golf tourism configuration, centred upon Castelfalfi resort. In the '80s an entrepreneur from Milan bought Castelfalfi, a 1100 ha estate that included a middle-age village on the ridge of a hill, restructured its most relevant buildings (among which the Castle and the Villa Medicea) and created a golf facility and a hotel. More recently, the estate has been taken over by a German company that has restructured the golf course and completed the restructuring of the village, which now can host up to 4000 people. The project generated a heated debate within the local community about the sustainability of the project. As a matter of fact, environmentalist associations accused the project promoters of appropriating natural and cultural heritage upsetting its authenticity for commercial purposes. In the resort website the most relevant messages are "Relaxed atmosphere, stunning scenery and challenging

game - the Golf Club Castelfalfi" and "The simple life lived well". The concept the resort wants to convey is that tourists will be able to enjoy the true Tuscan life "you will have the tranquillity and comfort of a private home, in surroundings that encourage a relaxed and sociable lifestyle. But with all the services and amenities of a contemporary luxury resort" (<http://castelfalfi.co.uk/resort/the-simple-life-lived-well/>).

Another tourist configuration is even more consistent in terms of numbers, and it is based on individually owned holiday houses. The main need of this type of tourists is to 'relax': they are not specifically interested in attractions and activities in the area, and their choice is mainly related to the aesthetics of the landscape and to the mildness of the local climate. On average, tourists belonging to this segment bring food from home, tend to visit art towns nearby and do shopping in malls. In other words, they have a 'mass' profile, do not live the specificity of the place (apart from the characteristics of the local landscape), and don't contribute much to the local economy apart from the rent they pay for the apartments. The business model emerging from this segment is based on rent and on buildings rather than on services provision: managing a holiday house is not necessarily a full time job, and the prevailing activity is related to maintenance of buildings. In other words, local actors prefer to enjoy a rent of position related to the 'inherited' elements of territorial capital rather than contributing to preserve and restore them. There is a clear shortage of entrepreneurs able to prompt collective action to improve and increase the 'built' part of territorial capital. A weak relational capital makes it difficult to valorise the territorial capital of which the place is endowed. This configuration creates a lot of pressure on the environment as houses, used for not more than three months per year, consume land and water, as in most of the cases they are also endowed with a swimming pool.

Rural tourism is not well grounded either in the traditional rural world or in agriculture. The specific development pattern of rural tourism in the area has only marginally involved agriculture. Agri-tourism itself, which had a strong growth during these years thanks to investors from outside and that constitutes a third tourist configuration, privileged accommodation services and neglected those more related to agriculture activity, such as producing typical products and selling on farm. Contrary to other rural tourist destinations in Tuscany (see Brunori and Rossi, 2000), and despite the fact that the municipality is located within the boundaries of the production area of many quality and typical products, Montaione does not distinguish itself for its gastronomy or for typical agricultural food products, nor rural services offered by farms are diversified.

The story of Montaione and the type of leading actors has, in other words, strongly affected its development pathway. The existing tourist configurations, despite their potential, show weaknesses that, if not ad-

dressed properly, may create problems of economic, social and environmental sustainability.

### **Embedding rural-naturalistic tourism: the case of the natural Park of the Casentino Forests**

In high natural value areas agriculture is often one of the main forms of land use and/or support a high diversity of species and habitats (Andersen *et al.*, 2003). Many of these areas are subject to severe pressures mainly due to depopulation and economic decline, leading to land abandonment (EAA, 2004). In this context, the tourist-recreational use can be considered a suitable valorisation tool, especially when rural tourism takes the connotations of rural-naturalistic tourism, combining the naturalistic motivation to the interest for the rural world and / or a stay in rural accommodations (Pagni, 2002).

The area of the National Park of Casentino Forests, Mount Falterona and Campigna, in north-eastern Tuscany<sup>3</sup> is an interesting case for analysing the on-going dynamics and identify obstacles, blocking factors and best practices in the field of rural-naturalistic tourism.

Forests dominate the territory, and agriculture shows the typical characteristics of high hills and mountains activity. Agriculture is characterized by cattle and sheep rearing, and cultivation of fodder crops, cereals and fruit. There are some typical products linked to local agri-biodiversity and expressing the cultural identity of the place, too (Cavaliere, 2011). Agriculture is characterized by a high degree of multifunctionality: the contribution to landscape, cultural and environmental quality is of great importance in spite of (or perhaps because of) its limited dimension.

In the Casentino park area rural tourism is still not widespread in comparison to what other areas of Tuscany, but local communities see interesting opportunities in its development.

The accommodation on offer in the last years showed a strong growth in non-hotel structures (mountain shelters, campsites, hostels, farmhouses, holiday homes, bed and breakfasts, inns, guest houses and apartments), while the hotel supply remained broadly stable. Agri-tourism is the most common form of accommodation (42% of the total number). There are no large accommodation firms as happens in other areas with a widespread rural tourism (as in Montaione). Another relevant characteristic is that entrepreneurship in the tourism sector is largely of local origin.

Traditionally, tourism was focused on visitors coming from neighbouring territories (Emilia Romagna and Central Italy) and almost exclusively

<sup>3</sup> More specifically, the area analyzed in the research is the whole area of the seven small municipalities whose territory is included, in whole or in part, in the Park. See Belletti, Marecotti, and Simoncini (2011) for more details on that case study.

motivated by the enjoyment of a pleasant environment during the hottest season (the so-called 'tourism of cool places'). This tourism, that flourished in the years '50 and '60 and was based on medium-sized and large hotels supplying very standardized services, has strongly decreased. Nowadays the most common forms of tourism are driven by art and culture, tourists being especially interested in the villages, castles and churches of the valleys. Besides, there is a strong religious tourism, linked to the presence of ancient monasteries. The establishment of the Park in 1990 has contributed to the evolution of the type of guests who visit the area, developing a new segment interested to naturalistic, environmental and rural resources.

Group tourism (mainly schools and religious associations) is widespread, as well as individual tourism in the weekends. Tourism in the area is 'hit and run': guests enjoy considerable autonomy during their stay in the area, seek a limited number of services, are focused on only a few specific attractions and do not stay in the area after or before the visit. The tourist flow is strongly seasonal and limited to a few days and to some specific places (in particular the small towns of the valley and the main monasteries), while rural areas and natural areas are very marginally involved.

In general, the tourism is 'low impact'. On one side this implies that there are no major problems of unsustainability related to tourism pressure, except some significant concentrations of attendance in the major poles of attraction of the area at certain times of the week and of the year. On the other side this means that there is a problem due to the lack of ability of local actors to valorise territorial capitals and to intercept new trends in tourism demand. Indeed, the new potential customers show specific and segmented needs, look for alternative experiences and are more demanding about the quality of services, that the local tourism system seems to fail to provide.

In the Casentino park area three main tourist configurations can be identified: religious, historical-cultural and rural-naturalistic. For a long time the three configurations were separated from each other, both from the supply and the demand point of view. As a result, visitors for religious or cultural motivations, for example, have so far very little possibilities to access information about the characteristics of the park and rural-naturalistic resources of the area.

In recent years awareness of the need to strengthen relations between the different tourist configurations has grown, thanks to the initiatives of some local actors and to the active support granted by local government bodies.

The rural-naturalistic tourism is perceived as an opportunity to integrate in the tourism dynamics the entire territory of the Casentino Park, include the more marginal areas, and attract new segments of demand. The emerging rural-naturalistic tourism configuration is built around the idea of a tight integration between environmental, rural and cultural resources in the area, but its further development faces some major challenges.

A relevant challenge is represented by the mobilization of actors and local resources around a shared identity focused on naturalistic and rural values, which can improve the recognition of the area from the outside. As in rural tourism there are not, by definition, strong poles of attraction, this requires a bigger effort by local actors to link the resources of the area in a common network. In this context a critical issue is the role of the agricultural sector in accommodation offer and in local tourism system. Farmers have contributed in the past, and are contributing now, to the creation, preservation and reproduction of important elements of territorial capital; nevertheless up to now they are not included in local tourism dynamics and benefit only marginally from tourism. The inclusion of the agricultural sector asks for specific policies aiming at empowering farmers as well as other 'minor' actors who are not part of the tourist industry but important for the construction of territorial identity.

Another challenge is the tourists' access to territorial capitals, which are scattered throughout the area. This requires a strengthening of tourist information by means of reception and orientation services, enhancing sustainable transport systems to improve communication between the upper and the lower sides of the area, infrastructures to improve access to naturalist attractions, and initiatives and events evidencing the network of territorial capitals. The small number of tourists, however, makes it difficult to start up these services at individual scale, and reinforces the need for networking and cooperation between local actors, not only between tourism service firms and between them and local government bodies, but also with the other components of the local system.

Local governments bodies now identify the development of tourism as a strategic leverage for the socio-economic development of the area. The system of responsibilities in the tourism field appears, however, weak and fragmented among the various government bodies in the area (two Provinces, two Mountain communities, seven Municipalities). Many of them play a relevant role for strengthening the territorial identity, make relevant investments on territorial capitals (e.g. a network of Museums of local culture), and provide services to firms and tourists. Nevertheless a better coordination is needed, by means of a system of public governance of tourism in the area.

The presence of the National Park of Casentinesi Forests can play an important role not only in terms of the preservation of the original characteristics of the territory, but also for the coordination role that the Park can play with other local government bodies. The Park represents an identification mark for the area as a whole, and can also act as a quality insurance body, developing some quality standards for accommodation services, too. The major challenge now is to build a governance system able to integrate different public and private actors around a shared vision of the rural-naturalistic tourism development and capable of giving coherence to individ-

ual efforts. The governance system should promote collective initiatives in the fields of technical support to firms, promotion of the area and implementation of events to link together the existing tourist configurations.

### **Concluding remarks**

This paper tried to introduce a new perspective on rural tourism. Contrary to many studies that tend to give for granted that rural tourism is sustainable and beneficial to rural development, this paper has highlighted a 'dark side' of rural tourism, which may generate pressure on territorial capital and jeopardize fragile equilibriums.

Using the concept of rural tourist configurations, we showed the complexity and multidimensionality of rural tourism. Each tourist configuration taps on specific aspects of territorial capital, and there may be potentialities for synergies as well as conflicts between them over the use and the management of local resources.

These findings have relevant implications for policies. First of all, rural development policies addressing rural tourism should be based on appropriate sustainability assessment: carrying out a 'green' activity does not necessarily mean that this activity does not generate pressures on the environment. Moreover, social and economic sustainability may depend on the balance between tourist configurations. Tourist development strategies focused too much on building houses and infrastructures, as in Montaione, may limit the potential of synergies with other economic activities, first of all multifunctional agriculture and agro-tourism. External investments, although important for local employment and incomes, may undermine the local cultural heritage as well altering ecological equilibriums and displacing local entrepreneurs.

The presence of sites of high natural and cultural value, and especially of a Natural park, can support the development of rural tourism, provided that local administrations are willing and capable of imposing rules on change of land use and rural buildings, and by promoting an attractive image of the territorial quality outside the area. However, this does not guarantee the presence of positive relationships with the agricultural sector, which on the contrary should be encouraged.

A number of obstacles to the development of competitive rural tourism configurations emerge, deriving from the polycentric nature of rural tourism, from the fragmentation of the supply of accommodations, and from its often-small scale and non-professional character.

Rural tourist configurations have to face these challenges and they can turn the peculiarities of rural areas into opportunities to link up with specific segments of tourists. Both case studies demonstrate that collective action is the key factor to obtain a satisfactory degree of social, economic and environmental sustainability. We think that a specific research agenda

should be developed on this regard. The success, and the degree of sustainability, of rural tourism relies to a large extent on the capacity to build social and institutional networks that coordinate individual action and foster cooperation and shared values.

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PART TWO

CONFLICTS AND COMPLEMENTARITIES:  
OLD AND NEW ACTIVITIES,  
OLD AND NEW ACTORS



B. Brandth  
M. S. Haugen<sup>1</sup>  
B. Kramvig

# Taming the Village Beast: Rural Entrepreneurship as the art of balance between economic growth and social sustainability

*"In this neighbourhood, there are strong sentiments for what we are doing [...] We have had some entrepreneurs here – somebody who just comes in, and stomps off without looking around and involving the people in the processes, infuriating the people. There are many people who use these areas in different ways, and that must be taken into account". (A business entrepreneur in rural Norway)*

## Introduction

The establishment of new businesses founded on both nature and culture is seen as innovative and is supported by central authorities. At the same time, establishing a new business challenges local practices, ownership, power relationships and the community and can thus be an example of a classic social dilemma, where acts of self-interest collide with collective interests. Conflicts arise when common resources and goods are privatised, commercialised and traded on a market (Brox, 2001). New businesses, although seen by policy makers as a necessity for the survival of communities, are not always supported either by those living in the village, or by new entrepreneurs' funding agencies, something indicated by the quote above.

The resource base of sites and places, economic structures, traditions and established social organisations represent both opportunities and obstacles to entrepreneurship. Often, the social community's basic values and rituals are tacit and unspoken. A community's collective memory and common opinion are reproduced through practices that have traces of repetition and continuity (Connerton, 1989). The key claim that anchors this enquiry is that these are the unwritten rules that entrepreneurs should follow when it is community assets and resources that are being turned

<sup>1</sup> Corresponding author, [marit.haugen@rural.no](mailto:marit.haugen@rural.no).

into tourism products. In order to assess this claim, we review the social interaction between entrepreneurs who establish farm tourism businesses and the local communities in which the businesses are established. How do entrepreneurs experience this first meeting, and how do they design and adapt their activities to the local communities' unwritten rules? We examine this through academic and local understandings of this process – including the understanding of the metaphorical existence of the 'village beast' that guards boundaries in entrepreneurs' interactions with local communities. The 'village beast' may be a Scandinavian expression, but hopefully interesting in other contexts as well.

### **Establishing the business – between individual opportunities and collective frames?**

Establishing a business and entrepreneurship is about using resources in new ways, and often challenging existing values and practices. It is an economic as well as a social activity (Berg & Foss, 2002, Bruni *et al.* 2004), and it has both an individual and collective side. We are interested in the social and cultural context of local entrepreneurship and business development, and how this frames the establishment of nature-based farm tourism in small local communities.

Establishing new businesses in rural areas is a complex process and is the focus of much public debate and research. Parts of the traditional literature on entrepreneurship have focused on the individual characteristics that transform an individual into an entrepreneur. Successful entrepreneurs require certain characteristics, for example, people should be resourceful and enterprising with strong creative abilities (Chell *et al.* 1991; Aslesen, 2002). More recent research on entrepreneurship has been concerned with the social and cultural context in which the establishment of a new business takes place (Berg & Foss, 2002,; Borch & Førde, 2010).

An early commentator on this perspective was the Norwegian anthropologist Fredrik Barth. In his book, *The Role of the Entrepreneur in Social Change in Northern Norway* (1963), he places the main focus on the entrepreneur's cultural and social surroundings. He showed how the market model of economic rationality and individualism failed because the model did not include societal and cultural dynamics (Tambs-Lyche, 2009). Barth also showed how entrepreneurs were in complex relations with others in the local community. They often had complex and contradictory values that had to be balanced simultaneously. In Barth's model, common interests were important and innovation occurred when two different value-correlated spheres were linked together so that the circulation of value was altered. It had consequences for the entire society, since the boundaries of what could be converted into the economic sphere were shifted.

In other words, the cultural and social organisation of a location affects the actions of the people who live there. As such, the establishment of a business will take place at the interface between the individual and their local context (Spilling, 2002). Although entrepreneurship is characterised by its individualism, these contexts have a great significance for which individual strategies are available.

In their article on lifestyle entrepreneurs in the tourism sector, Ateljevic and Doorne (2000) show how these kinds of regional cultural contexts affect the development of small businesses, reflecting the classical dichotomy between market driven economy and social consciousness. In their study economic and business growth opportunities was held back as part of the entrepreneurs' socio-political ideology. A sustainable relationship between businesses and local communities help to explain why businesses remain small and 'stay within the fence', as they say. Small-scale entrepreneurs have motives other than purely economic ones; for example, contrary to the expectations of most business literature they may be happy to accept low earnings and limited growth of the business (Ateljevic & Doorne, 2000).

The same also applies in the agricultural sector where the establishment of new activities on a farm is often grounded in rationalities other than economic ones (Brandth & Haugen, 2008; Kroken *et al.* 2009; Sve, 2010). In understanding farm-based businesses, we find the term 'civic agriculture' being used (Wright, 2006), which refers to agricultural activity that also pay attention to local social responsibility. Farm-based businesses are, in these situations, balanced between the demands of both market and society. In the research literature, this form of agriculture is described as having mutual benefits and is interwoven into social and economic strategies that provide economic benefits to the farmer, while also socially favouring the local community (Trauger *et al.* 2009).

Jante's Law (Sandemose (1933/1991)<sup>2</sup> is said to pose a special challenge for entrepreneurship in rural areas (Bolkesjø & Haukeland, 2003). Jante's Law is a common expression throughout Scandinavia, referring to a negative attitude towards individuality and success, in Norway popularly referred to as the 'village beast'.<sup>3</sup> Following Lakoff and Johnson (1980, 1999),

<sup>2</sup> "Generally used colloquially [and sic.] as a sociological term to negatively describe an attitude towards individuality and success common in Scandinavia, the term refers to a mentality which refuses to acknowledge individual effort and places all emphasis on the collective, while punishing those who stand out as achievers. The term may often be used negatively by individuals who more or less rightly feel they are not allowed to take credit for their achievements, or to point out their belief that another person is being overly critical." ([http://en.wikipedia.org/wiki/Jante\\_Law](http://en.wikipedia.org/wiki/Jante_Law)) 27.10.2011.

<sup>3</sup> The term 'village beast' (in Norwegian: 'bygdedyret') was first used by Tor Jonsson (1950) in the short story "Liket" (The corpse). Since then, the concept has become more widely used in academic and popular discourse to describe various types of social control and sanctions against those who stand out. As the term suggests, it is often associated with small and transparent (integrated) societies.

we view this ‘village beast’ as a metaphor that makes it possible to use conventional mental images to render subjective experiences more visible or comprehensible. In this study we will also use it as a heuristic device – a thinking tool.

The concept ‘village beast’ draws the lines between these subjective experiences and collective manifestations. It consists of loose and partially random, complex experiences of opposition or experiences of situations where the moral boundaries are manifested. Thus, the term, when used in everyday language, encompasses experience of social and cultural opposition. The metaphor has often been used as an explanation for why it can be so hard to be different and stand out in a village, and it is a fitting description of the opposition that innovation can meet locally (Førde, 2010). Hompland (2000) provided the following definition of the ‘village beast’:

[...] A watchdog – kind and faithful to those who conform and follow traditions, but it barks against newcomers and snaps after those who stand out. The ‘village beast’ is controlling and restraining, and it has an ill-tempered long-lasting memory. It is on a constant hunt for dissidents”. (our translation)

The commercialisation and utilisation of collective natural resources can create tensions and conflicts in a local community and thus challenge the consensus of how resources should be managed and distributed. This is particularly true if the players challenge the social practices and power relations in a community (cf. Bolkesjø & Haukeland, 2003). In all societies, there are limits to what can be traded as monetary goods, and sometimes the values-barrier to marketisation of goods is high. When the cultural values, or any other values that are important to the community, are commercialised through the strategies of individual entrepreneurs, a value-based, moral public debate can ensue. This provides a challenge for entrepreneurship, and is something entrepreneurs need to consider if they don’t want to risk waking the village beast.

Flø (2008) demonstrates these kinds of dynamics by showing that landowners who want to sell the hunting rights to their land end up challenging the social justice norms of the community, or what he calls “*the area’s own collective morality*” (Flø, 2008:388). Although landowners formally own the hunting rights and, in principle, are free to sell them to the highest bidder, the social rules of the district reflect the belief that local people should have access to the hunting ground at a reasonable price. According to Flø the ‘village beast’ does not oppose any change in the village. Rather, it monitors that the changes do not happen too fast. He argues that the close and informal links between people, which are typical of dense, transparent rural communities, create a high threshold for violations of locally defined social rules (Flø, 2008:389).

Community acceptance of new ways of farming and new uses of farm resources will vary from context to context. According to Høgetveit (2008:73) there is a correlation between local acceptance of an idea and the plausibility of implementation of the idea. If acceptance is poor, it might be either because acceptance of the idea is not compatible with the current economic conditions in the culture. Not everyone is dependent on gaining acceptance from the community in order to fulfil an idea, but it is easy to imagine that those who start new business activities based on local resources, as is the case with farm tourism, are largely dependent on local acceptance; commercial activity is place-bound and localised to a particular community. It cannot be moved to another area, and the entrepreneur will continue to live there and be a part of that community. The costs of acting against the interests and acceptance of the community may be perceived as too high.

It can be a delicate balance negotiating between the penalties expressed in the metaphor the 'village beast' and the act of caring about one another in a positive way. Villa (2005) and Haugen and Villa (2008) have shown how the community can be both inclusive and exclusive, caring and controlling at the same time. It is also important to recall that this is not a phenomenon peculiar to rural areas. All communities have built-in boundaries. It is the formulated 'we', rooted in value-based and symbolic markers, that communicates difference. Solidarity and slander are two sides of same coin (Hompland, 2000), and anyone who violates local conventions may be at risk of community sanctions.

But there are also strategies to counter such opposition. Follo and Villa (2010) mention two ways in their study of innovation. One way is to give ideas time to 'mature' among the villagers. The second is not to spend time and energy on the negative voices, but rather concentrate on positive messages. A third strategy, which Førde (2010:166) introduces, is to "*strip the village beast*", i.e. to counter the opposition and build up one's motivation to fight against it through creativity and enthusiasm.

As we have shown, social and cultural contexts affect how rural businesses are set up. Nature-based farm tourism builds on the use of local and collective resources, which requires negotiation and local acceptance. In the rest of this article, we examine how farm-based tourism entrepreneurs were received, and what strategies they used to adapt their business to the local society's unwritten rules. There will be a special focus on the strategies and tactics used by farm tourism entrepreneurs to deal with any local scepticism and opposition.

### **Data collection**

Research for this paper was conducted during fieldwork conducted from 2005 until 2008 to study farm based tourism in Norway. The main



objective of the study was to identify who the farm hosts were and how they operated their businesses. Two surveys based on different samples were conducted. This paper, however, is solely based on qualitative data. Twenty family farms from various districts in Norway were visited and the farm couples interviewed altogether 35 persons; sixteen women and nineteen men.

In order to shed light on the entrepreneurs' experiences, we chose farm couples who had established tourism businesses on their farm. In order to avoid any influence of regional variation in innovation- climate, we interviewed entrepreneurs from different parts of the country. We selected most of the sample from a catalogue marketing farm tourism businesses. In addition, we relied on our network and own knowledge of possible cases. Criteria for sampling were that the enterprises had small-scale tourism activities based on a family farm which was run by the farm couple who had the experience with the development of a new business. Half of the farms combined agriculture with tourism, while the other half has discontinued traditional agriculture, in order to focus on farm tourism only.

All interviews were conducted at the farm site and in most cases both spouses were present. The interviews were characterised by open thematic questions, which provided plenty of room for further explanation and the elaboration of the respondents' own stories. One of the themes central in this article is the kinds of reaction that the entrepreneurs have encountered in local communities. Each interview lasted between one and three hours, and was recorded and later transcribed for analysis. The interviews were conducted in Norwegian language and in this chapter the quotes used are translated by us into English. All the interviewees are given fictitious names.

Some of the entrepreneurs in the study have run their business for less than five years, while others have been around for over 20 years. The farms that are still in operation produce a variety of products, mostly meat, milk and grain. The tourist activities offered are diverse and adapted to various groups of customers. Accommodation and food are offered by nearly all, in addition to activities such as fishing, hunting, hiking, guided tours, canoeing, horse riding and cultural activities.

The age of the entrepreneurs varies: the youngest couple were in their late twenties, while the oldest were in their sixties. Education levels are relatively high compared to the wide Norwegian population. Some are in-migrants, while others have taken over a family farm and wanted to do something other than conventional farming.

### **Stories about opposition**

Nils and Randi had been looking for a farm for a long time, and when they found their dream project, they bought the farm and moved to the village. Both were trained in teaching and continued as teachers while ren-

ovating the farm buildings, starting with sheep and eventually farm tourism. "As in-migrants and with a long education, you have a problem when you come into a village", says Nils. They became particularly aware of this in the beginning:

When we bought the farm, an old lady called and informed us that it would not be easy for us. She had had so much trouble with the former owners here and she anticipated that the dispute between the farms would continue. And we did feel the 'village beast' along the way with people who were difficult and who thought we created a lot of traffic and that sort of thing. And there is a lot; and it's part jealousy, when you succeed. So we did notice that the strangest little thing could still lead to rumours about us.

They had to deal with the former neighbours' dispute and the community's 'long tempered memory', but eventually they began to earn respect for the work they did and they developed a good relationship with some parts of the local community. Nils believes that one reason for this is that there has been a generational shift on the farms. This has, according to Nils, probably led to a slightly more open and modern society with a greater acceptance of those who are different.

Brit and Roger have also found that existing conflicts with neighbours are challenging. They bought an abandoned farm in a village characterised by high out-migration and low economic activity. They tried to bring about cooperation with several people in the village, but "it is a bit like if you cooperate with this person you must not approach this other person as they are not on speaking terms".

Another informant, Leif, responded to the question of whether they had met any form of the 'village beast' as follows: "It is there, but we don't confront it [laughs]. We keep it at bay". The couple bought the farm from an elderly relative and moved to the village as adults. They have chosen to focus on organic farming and serve self-produced organic meals to their guests. In this way, they differed from local farm practice and experienced scepticism from the other farmers in the village. The fact that their tourist business means more traffic has also led to more opposition among the neighbours.

Mariann and Olaf are also newcomers to their village. Both grew up in the city and gained their education and professional experience in the school system. They bought a family farm from a distant relative and sensed distrust from the beginning, which they perceived was due to the fact that they had no background or experience in agriculture: "[...] here comes the young teacher who thought he was something, huh". Olav laughs and says: "It always makes better stories when there is something that has gone a little wrong". Mariann says that they have been pioneering in some areas, and that it might have created some envy:

But then it is about achieving something that others would have liked to achieve but that they never have set out to do or managed to do. They see that there is something happening and that we might get it right. Maybe someone had a dream about doing it themselves, but never got around to fulfilling it.

In Mariann and Olav's case, they have met the 'village beast' as a watch dog that is wary of newcomers and people who are different, but by succeeding with their new business, they have also met it in the form of envy.

Martin has experienced a totally different aspect of the 'village beast'. He was born and raised in the village and was working in dairy farming on the home farm when he and another farm couple got together in order to take advantage of the farm resources to establish a nature-based tourism package on the outland<sup>4</sup>. When asked how they had noticed the 'village beast', he replied:

We noticed it in a way when very few neighbours came to visit us. It's kind of a feeling. It might not have been as bad as we felt either, but there were certain remarks made by the neighbours.

An important reason as to why the neighbours were not particularly positive related to the use of the outland area, which previously had been freely available to all, but was now being exploited for commercial purposes. Martin says: "[...] everything had somehow been free of charge, right? And then suddenly we started to use that area on a commercial basis and charge for services and things like that". The area in question was located by a small fishing lake, and although it was part of the farm property, it had previously been used as a hiking destination and a place for the villagers to build bonfires.

This is a good illustration of the tensions that can arise when access rights are limited through commercialisation (cf. Brox, 2001). Tourists are basically strangers. They are not part of the local, social community, and are thus not seen as individuals with local rights. Businesses must strike a balance between the interests of the place where the activities are to take place, and the concerns of the tourists and what they want to experience. When it is based on natural resources, these resources are often limited. There are a limited number of salmon in the river or cloudberry on the marsh – and there are often established local practices on how access should be distributed. When resources are not limited, as when the experience is related to local culture (stories, legends and handicraft) or sensory

<sup>4</sup> In Norwegian 'utmarka' which is surrounding the farm and owned by the farmer. It might include forest and rivers. In Norway the public has the right to roam in the outlands (legal rights of access to private land).

impressions (sights, stillness and darkness), local opposition is not triggered in the same way.

Some entrepreneurs view municipal bureaucracy as the largest problem. Brit and Roger have experienced opposition in both the local community and in municipal administration. Roger explains:

It is very difficult to engage in economic activity when there are both cousins (and second cousins) who run the municipality [...]. As a newcomer to a district, one does not know the game there, and they do not know us. So they take the easiest way out where they meet the least resistance. And it is a very delicate democratic situation. Not the least, if one wants newcomers and new initiatives. So the largest brake for regional politics is actually the district municipalities themselves. [...] Because there are so many preconceived ideas about where a business should be viable in rural areas, and where it should not be viable.

As newcomers, Brit and Roger represent something different that might challenge the usual notions and practices of the local community. Moreover, they challenge the local power constellations, and they have experienced being directly opposed and laughed at in the municipal bureaucracy. Part of the opposition is vague and can be interpreted as the 'village beast': "[...] the so-called 'village beast' has a tendency to creep up on you" says one of the entrepreneurs. Another one talks about a sense of opposition rather than any specific events: "[...] you could feel some kind of flicker here and there", says one, while another says that "we feel that there is a bit – that there is a bit Jante's Law, but I cannot actually point to any specific event".

The entrepreneurs' own narratives show that they have experienced multiple types of opposition: conflict with neighbours, opposition to the commercialisation of the resources that are covered by public law, the local bureaucracy's lack of support and some vague feelings of jealousy and scepticism. This experience of opposition is a reminder that entrepreneurs cannot easily pursue individual interests independent of local and potentially competing, cultural frameworks. In many cases, it may be a matter of conflicts of interest, where the locals have to bear the costs in the form of increased traffic and competition for scarce resources, without receiving their share of the revenue generated by tourism.

Despite the fact that entrepreneurs describe the 'village beast' phenomenon appearing during the establishment phase, most of our informants experienced a good relationship with the local community once the business was established. It may be that those who faced considerable local opposition have given up and shut down, or that the locals actually experienced the establishment of a new business as positive growth. It may also be due to the way in which the entrepreneurs manage opposition. It is this

management of opposition that we review in the following section when we ask how the 'village beast' is dealt with or 'kept at bay'.

### **“We feel our way forward”**

Most entrepreneurs spoke of the gradual development of their business. By taking one step at a time and testing what to do next, they attempted to avoid the abrupt and large changes that may trigger opposition in the local community. That local opposition really comes into force when things move too fast was documented by Follo and Villa (2010) in their investigation of what it takes to “build a rural community”. Our entrepreneurs expect the opposition to disappear as time goes by. Gradual development appears to be an important adaptation strategy for rural interests. If an idea is to be viable, it must not be too widely opposed by the community. At the same time, the introduction of anything new will, at times, encounter some opposition. Innovation nearly always involves challenging the boundaries in a society and those factors within society that are normative and/or the status quo.

In our material there are many examples of businesses that have developed gradually (Brandth *et al.* 2010). One of them is Nils' story about how he and his wife first started with the family tourism business in the summer almost 25 years ago. They began, almost by coincidence, because they had a vacant house on the farm that was suitable for rental. As tourists looked after themselves, there was little labour involved. Step by step the barn was converted to catering and banquet facilities, so that, some years later, they could accommodate bus groups, and offer courses, conferences and parties. “We have been building for 20 years and it has just expanded gradually” says Nils, while emphasising that they will keep the local feel and do not increase the number of guests at any cost. Birgit and Leif run a business with accommodation and meals served on their farm. “We have changed quite a bit of the operation along the way”, says Leif. “We feel our way forward”, says Birgit, and continues:

We have been doing this for six years now and have not marketed our business anywhere. And we have had to say no to quite a lot. [...] But we're not going to expand the business so that we need to hire employees. Because then you need reasonably high turnover.

In this way, they also limit the traffic to the farm that annoys the neighbours.

That the development is slow is not only due to economic and work-related constraints, but also reflects the owners' beliefs that growth should not come at the expense of quality, satisfaction and social sustainability. “The financial side is one thing, but you should also enjoy it” says Roger. They enjoy it when their business does not cause opposition in the vil-

lage. Brit explains why they will not grow to the expense of their farming activities:

If we are only to focus on tourism, then we can stop the farming altogether, but then we lower the quality of what we deliver. And maybe we need to sell to more tourists to sustain our livelihood, right? And that's not our goal. We want to have fewer guests and a higher quality on what we deliver. And thus we can charge a higher price.

This quote illustrates that the entrepreneurs want to maintain the quality of their products and, in this case, maintaining farming remains an important goal. They are also concerned with both social and ecological thresholds; too many guests will ruin the experience of nature and will cause wear and tear on them and the farm enterprise.

The entrepreneurs take into account many considerations in the early development phase and in the further development of their products. Farm tourism should be a livelihood that gives them an opportunity to continue to live and stay on the farm. At the same time, their livelihoods are also dependent on being socially and culturally sustainable.

### **“To not be at odds with anyone”**

Another way to respond to opposition is to look after local relationships and have an open dialogue with others in the village. “It is important that we are open towards local people about what we do so there is no dissatisfaction”, Henry says firmly. There are many factors to consider in the establishment and development of new ventures, and relationships with the local community and with people in the village where they live are cherished.

Some of the entrepreneurs have all the tourist activities on their own property. They think that it is best that way, since they feel that people are wary of boundaries, and it is something they will not challenge. “We are very conscious of not stepping too much on other people's property and instead we use our own area. Because it is stuff like that that will cause conflicts” says Olaf.

Others, again, are totally dependent on using the access to shared resources on the outland in order to operate their commercial tourism business. The public right of access to land makes all natural resources potentially public available for use, and thus requires special safeguarding. Vulnerable flora and fauna can be subject to excess and major stress with increased use. Hunting and fishing rights, which many local people take advantage of, is an area that must be dealt with sensitively in order not to challenge local norms and established practices (cf. Flø, 2008). In areas where there is already some pressure on these resources they avoid hunting, fishing and gathering of

cloudberries as part of the activities that they offer. The cloudberry moors are also kept secret from people outside the local community.

Kari and Henrik describe how they balance their own interests and the interests of the community. They have reduced their number of rental boats and fishing cabins to tourists so that they are not “*at odds with*” the locals. Henry says:

We had more fishing tourists before than we have now. But we have made a conscious choice not to pursue fishing tourists. It has to do with the fish resources and cooperation in rural Norway – that one should not get on the edge with the others. It’s a little exaggerated because people often think that the fishing tourists catch too many fish, but that is not the case. The vast majority have never, not even before the quota came, brought home more than the quota.

In 2006, a limit on the amount of fish that tourists were allowed to take out of the country was introduced. The quota was set at 15 kg of fillets. As we see from the quote, according to Henry, the quota is so great that tourists have tended not to exceed it. Despite this, he has adapted to the local people’s scepticism and he is moving away from fishing tourism as a prioritised area for his business. The reduction has taken place gradually in the way that they stopped promoting fishing as a part of their package of activities.

It is not merely community resources that are important to safeguard. Tourists can be both interesting and annoying, and there are aspects of their behaviour that may provoke the locals. If entrepreneurs are to ensure sustainable local relations, they must also make sure that the guests behave acceptably. Sofie and Raymond, who also engaged in fishing tourism, have set limits for the guests’ alcohol consumption in the interests of the local community:

We do not accept that they stagger around and are visibly intoxicated here. There are kids and there are locals, and we don’t want that reputation. We are quite strict with this. They’re welcome to grab a beer, that’s ok. They are welcome to sit inside the cabin and enjoy themselves, but they cannot walk about drunk on the farm. And they’d better not be seen visibly intoxicated or drunk at sea, that we do not accept. I’ve had those who have rolled ashore on the pier. And then I’ve been down and removed the hose from the gas tank and locked it up.

A number of the activities that businesses offer attract people who seek excitement and risk, or who are inexperienced with hiking in the countryside or being at sea. As this quotation shows, farm tourism entrepreneurs find it important to reduce danger and the risk of accidents. It may be that the entire community’s reputation is at stake. This emphasis on social sus-

tainability of the business challenges the models we have on entrepreneurship where risk-taking and economic rationality are central. Here we see some of the 'village beast's' positive sides.

### **To give and to take – mutual benefit**

We have seen that decisions made by the entrepreneurs are based on cultural and social considerations of what is appropriate to do in their local context. One key way to handle the 'village beast' is to balance growth and sustainability in their own business. One example of this kind of strategic management is that they will not let their business grow at the expense of community resources. It can help to develop a mutual understanding between the entrepreneurs and the local people. Nils, who has been very aware of this aspect, talks about the 'village beast' that disappeared, and he says:

There are only nice people here and people who want to cooperate with us and they are generous. We no longer think about whether things are mathematically justified economically. Because if you help me now, and it has a cost, then it will all work out in the long run, that is how it is. That's how they are towards each other, and it is this community we are part of.

Harald points out that "it's a volunteer economy", where the logic is to give and to take. It would have been different if they had been in a big city, he says, but in the village everyone is totally dependent on the local resources. Consequently, they draw on local businesses and neighbours in their projects – as human capital and manpower. They shop at the local convenience store and buy from local producers even though it might cost a bit more, and they believe that it is important to spread the opportunity of income to others in this way. Mariann says:

We quite like to use the closest first, so there are many who have their earnings from here during the year. Both the local dance group and fiddle players and, yes, even the local horse and carriage.

Involving local people seems to have a great significance for the lack of opposition, and thus the survival of the newly established business. Harald says:

We have made an alliance with our neighbours. There is one who is very interested in nature, and we use him. There is another retiree close by who helps us when we have trips to the bonfire place. He goes ahead and arranges the fire and has freshly brewed coffee in the black kettle hanging over the flames. We are met by the scent when we ascend. You can imagine the delicious smell of freshly brewed coffee.



When the tourists show an interest in the local history, and when locals are given the opportunity to participate, then their pride is strengthened in what they have to show and the story they are part of: “When people come from Oslo or London to experience what we have here, then they [the villagers] become proud and pleased with what they have” says Harald. The tourists’ gaze and interest becomes a reflection through which they see their own community, and through which they see their own resources and expertise. As research has shown, it is in meeting with others that what is valued locally becomes apparent (Hammer, 2008). The place and the stories about the place belong to the locals, and many have a strong relationship with the area where the tourists hike. Many entrepreneurs are trying, therefore, to draw them in.

Several entrepreneurs say that they have been very aware of using the local resources and culture as part of their business, partly because they focus on local foods, local handicrafts and local labour to the extent it is available. One of the entrepreneurs says the following about how he and his wife are trying to draw on local culture and resources:

Paid activities here are based on the fact that we bring in resources, and there are activities in the community that we send guests out to attend. We use, for example, a cutler, who is part of the local tradition, and who lives here in the valley. He can have eight guests sitting around him in the workshop one morning, and who then returns home with his or her own knife.

Several attempts have been made to transform local resources into activities and products. There is some trial and error. Some have been successful, but not all – for different reasons.

Laila says something along these lines:

It is somewhat important to play on the others, too. Maybe even think that one shares the revenue with the others in the village. As such, we have been quite conscious of it here. When it comes to the guided tours [...] we have a few places in the village that are tourist attractions, where you can ask for guidance for a fee. But, often, the tourists feel that they have seen something like this before, and they don’t want to pay for it. We have first-hand experience that they do not pay for such a service. But now, if we are asked to arrange a guided tour through the valley, we contact those who have places of interest and ask if it is all right if we come by with a group at a particular time. Then we give one price that covers all expenses. When we are done, we will pay out to everyone involved. [...] The people we have collaborated with, they have been very happy with this arrangement.

We see how Laila, through a conscious pricing scheme, ensures that the others in the community receive commissions. It is a gift-exchange logic,

where everyone gains something from it. Laila does this so that there is income for more than one person, and she thinks people understand that the activities on their farm benefit the whole area:

And sometimes we get feedback. Not very often. But there have been some years when we received an award. And then it was neighbours who came around and shook our hand and congratulated us. One thing is that they appreciate it, but I think that it is a recognition that they actually show it [...]. There were, of course, some who did not. And I do not expect everyone to do it either. But it shows that people think it is good. Not just that they congratulate, but they say that what we do is good.

There are not many who say that they have received direct, positive feedback from the locals as Laila has experienced. But another way to show that one appreciates the visitors to the village is that local people take responsibility for how it looks in the village – that bushes are cleared and flowers are planted. Tourism benefits from clean and nice surroundings in the village. Fishing tourists, for example, are dependent on the landscape being kept open so that it is possible to get down to the river. The reciprocity in the relationship appears when the entrepreneurs give praise back to the village:

When we have guests here, we often hear about how nice it is in the area. Not particularly at our place, but in the valley. And it does something with us as individuals. We grow from it. But our neighbours may not hear it. So we try to be as conscious in the context when it is natural to pass on the praise. Because our neighbours make a great effort in relation to what we enjoy as hosts for tourists, you might say. And it is somewhat important to be aware of this. For it is the first impression visitors get when they come into the valley, which we benefit from.

Some of the farm tourism businesses have specialised in courses and conferences for the business market, others receive large bus groups for day visits, while others have guests on extended vacations. In such cases, the local market is less relevant: “They [locals] do not buy a lot of services here”, says Mariann, “but they [the municipality] are quite pleased to talk about us as a place that has a kind of status in the village”. Such pride that comes from having a well-managed and prestigious tourist activity in the village is still visible. In the sample, we also have several businesses with products that are tailored to local guests, such as groups of children or families on day visits, as well as large companies and events, and here there are reports of greater use of local resources.

Farm tourism businesses can also be a venue for the village. Some people make a conscious effort to include the villagers. This may be in the form

of a farm café or they may invite neighbours to gather for Midsummer celebrations and barbecues. Laila and Per have a social night for the locals one night a month. It has become a popular event in the farming village, as Laila says:

We have no café; we have no natural meeting place in the village. So, there is something about creating an activity where it is expected that the local people should turn up. It's quite exciting, because there is no guarantee. But recently there were over 50 people here, and it is a very good turn-out because there are actually not that many living here. So it's more like a kind of local offer in a way. [...] But it seems as if people find it enjoyable. And it's close by, so they do not have to plan very much. Because it's a social need to meet and talk about something else than work.

In order to further develop the community and cooperation in the community, meeting places are required. We see that farm tourism can provide such meeting places for local people, who thus get the benefit and enjoyment of those businesses that are created. Knut and Berit have created a nature and adventure park, and they say:

[...] We believe that it will meet a need, [...] we have seen that for Norwegian agriculture to survive, you are dependent on good relations with the surroundings and the local area [...]. And we are particularly pleased when the local people and neighbours tell us that they want to come. [...] It warms the heart when you feel that the local community sees what you do as something positive.

Farm tourism uses the community's assets and resources, but at the same time, it also makes available products that are developed based on these resources. In this lies the basis for the community's acceptance. Success lies in the balance between the individual and the collective, and between economic growth and social<sup>5</sup> sustainability.

## Discussion

The initial questions we asked were about the type of local opposition entrepreneurs faced in response to their farm tourism enterprises, and how they had potentially handled opposition associated with the so-called 'village beast'. The interviews show that everyone has experienced challenges involved in local entrepreneurship. Some have met the 'village beast' in the form of envy, ridicule, and scepticism of outsiders with new

<sup>5</sup> While the focus in this article has mainly been on social sustainability, in the Norwegian context there is an implicit inclusion of the environmental along with the social.

ideas who move away from the prevailing practice. However, there are only a few tales of this, and most of the entrepreneurs have not experienced large and destructive conflict. One explanation for this may be that the rural areas have become more diverse, and rural culture more open, to new ideas and businesses.

The second explanation, that we have explored in this article, may be the way in which the entrepreneurs have built up their businesses. We have shown that our informants avoided provoking local conflicts in three important ways. One way was to develop tourist activities carefully and gradually. The second was to maintain and build good local relationships. The third was to include local people in their projects and give something back to the community.

The analysis shows the existence of a rationality that is largely characterised by the entrepreneurs' negotiation with the site's social and cultural framework. They strategize not to grow beyond a certain limit, and they think they have succeeded in this goal when they manage to create a business that is closely aligned to the rest of the life in the rural community. Local identification is important both in terms of resources and social relations. Even though they, as entrepreneurs, see opportunities to develop new activities on the farm, they tread cautiously and are careful not to challenge the prevailing social practices and ways of thinking. In this way, they move local cultural and social boundaries slowly.

Several of the entrepreneurs in the survey are in-migrants who see new opportunities to commercialise resources on the farm and in the village. By taking into account local interests and the community's resources they reduce the 'threat' their new business represents. The community's interests are thus safeguarded by new businesses avoiding excessive use of local resources.

Opposition is weakened when the entrepreneurs are part of an informal collaboration in the community by using local businesses and culture in their business. It can provide both economic reward and help to strengthen local identity and pride. Thus the entrepreneurs will give something back to the village, and it evolves into a mutual give-and-take relationship.

Depopulation and closure of farms means that many rural communities are pressured as a community. It makes boundary setting more critical, it is important to draw boundaries between what we are, and what the others are. These are ways to defend the values that are considered important. The 'village beast' must be understood in this light. The tourist entrepreneurs can potentially challenge local structures and social order in the village. They can either succeed as our informants have done, or they may have to close down. It is therefore important that the social and cultural values have a larger place in the strategic assessment of new businesses – both by local regulators and by aspiring operators themselves. This balance

between new entrants and attention to community's values and resources can be a challenge both for the entrepreneurs and for the community.

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E. Meibeger  
M. Weichbold

# Requirements for Fertile Links between Farming and Tourism: Matching Supply and Demand

## Introduction

If we consider farming as food production and tourism as the consuming part, we are inclined to say: there must be links. They may consider accommodation as well as catering, just as infrastructure and local jobs. Most important here is the extent of engagement and the reason for failure or success.

There is a long tradition of guests on Austrian farms. That does not mean that they are welcomed everywhere with the same enthusiasm. In some instances farming is eventually dropped completely in favour of tourism, such as is the case of a rural hotel in the district of Upper Austria, where a traditional trap door in the floor leading to the basement is the only trace of the former farmhouse. In other cases tourism is met with disapproval eg. in a rural community in the province of Lower Austria where consent to the EU-cross border project for a bike track through arable land was denied on the grounds that bikers were just a nuisance for the farm traffic. Between these two extreme positions, coexistence, connections and cooperation between tourism and agriculture can be found in many different shapes and shades. Yet this does not say anything about how prosperous this linkage is: that is the question we are trying to investigate here.

## Contextualization of the problem

Mountain farms represent about 1/3<sup>rd</sup> of Austria's agricultural holdings (Lebensministerium, 2010: 8/9). Our studies were made in the province of Salzburg, as this is a mountainous region with a very intense touristic use of farm-potentialities. The operational size of farms in mountain areas in the Western part of Austria is very small. Full-time farms in grassland are



supposed to have a minimum size of 34 hectares of agricultural acreage (Lebensministerium, 2002: 135). On average, mountain farms own only a little more than half the required size, consequently farmers either accept paid employment in addition to subsidies, or they diversify and seek complementary farm-based sources of income. Without these measures many farms would be forced out of business. The 'Green Report' by the Ministry of Agriculture states that up to the 1990s one third of part-time farmers quit, but practically no full-time farmers. The size of the farms concentrates the efforts on the family, with all the benefits and disadvantages of a family enterprise.

As said above, farm holdings depend on a supplementary income or on diversification because of the scarcity of fertile ground and the small-scale landscape-structures of the mountain regions. Originally diversification means "a risk management technique, which mixes a wide range of portfolio" (Wikipedia). Diversification in agriculture is a viable option still in process. This way farms are not confined to production only, but engage in processing and distribution as well as in services. This way the surplus value accrued between intermediate steps stays within the enterprise and helps farmers to stay in business. Agricultural diversification and tourism is part of the LEADER programs of the EU [EU Regulation (EC), No.1698/2005] to secure the livelihoods of family enterprises. Chief primary production in the mountain regions is dairy farming and cattle breeding.

One of the most effective combinations for a cattle farmer is to engage in gastronomy. Production, processing and the contact with the ultimate consumer are thus concentrated in a personal union, regardless of whether this is in combination with a well-to-do restaurant or an 'Almhütte' (hut on a mountain pasture) serving snacks way up in the mountains.

At the same time diversification means for the farmer – and his family as well – acquiring additional skills and knowledge of at least one if not more professions. Since this is in many cases not possible following traditional routes, the Chamber of Agriculture continuously offers courses and professional advice. Moreover it will often be necessary to get in contact with similar enterprises and build up networks. Usually some family member has professional practice in the line pursued. Thus the socioeconomic context comprises education and lifelong learning. Former generations in rural areas often had a lack of higher education. Due to the inadequate infrastructure – just cart tracks led to many farms in the mountains until half a century ago – elementary school was the only option. This changed, when roads were built to each and every farm from the 1960s on. Educational legislation of this period shows the change in political consciousness, too. From then on education has been recognised throughout society as a central resource. Busses now take the children to primary school and high school, young people take professional training or go to college or

even a university. The result is that most farmers today have a profound general and vocational education, they are eloquent and have a professional appearance. (Meiberg, 2008: 117). Nevertheless a single farmer cannot cover each skill necessary for a diversified enterprise. Besides additional training it will often be necessary for the farmer to get in contact with other enterprises and learn from their experiences.

## Methodology

Because sociological phenomena are not only the sum of individual decisions and actions, it is important to consider the structural and the situational circumstances under which people act ('actants' in the words of Actor-Network Theory). That is why we believe ANT may be a help in finding appropriate methods for the topic in question. The logic of action is micro-oriented and empirical, but allows deductive inferences. Networks consist not only of human actors but also of actants: infrastructure, machines, animals, texts, money – in fact, any desired material (Law, 2006: 432). To bipartite the social and the material is considered to be an artefact, according to Bruno Latour you will never win a battle if you divide an army into a pile of naked soldiers and a pile of weapons, uniforms and equipment. ANT is process oriented and reassembles actors and actants. But if non-human actors are to be members of networks, they have to provide social services (Beilinger & Krieger, 2006: 37). That means, a road can only be regarded as an 'actant' when it is linked with social actions, like enabling the education of the children. For this topic, investigation of networks, resources, traditions, subsidies, statutory provisions, infrastructure etc. are used. The implementation of this theoretical framework aims at qualitative research: data collection by means of informal discussions rather than interviews.

Within the past years about 150 such qualitative interviews have been made to gather information about diversifying farms in the province of Salzburg, Austria. About 100 holdings of which are either directly involved in tourism or in the following range. 26 are referred to in this article. What we describe on the following pages are the main results and conclusions we have found in our research spanning several years. Due to lack of space we will not follow each trace in detail here (even if ANT recommends it), only the ones related to the topic.

The usual academic way would be to make a close literary research and use the findings of other sociologists, their thoughts and reflections as a foundation of a new theory and form a new puzzle by means of these pieces. Agricultural policy sets general targets largely based on such scientific works as well as on numerous statistics. The Chamber of Agriculture assists with the implementation of such goals and regulations, but it is the task of the single farmers to make them a success or failure. What we want-

ed to know was: how do the farmers get along with the conceptions and intentions of the authorities and what are the results of their efforts. Nobody else than the single farmers can give here any genuine information. Both politicians as well as groups of interest representation (Chambers) will interpret investigations as evaluation of their tasks. This is not what we had in mind. We wanted an actual confrontation with the experiences the farmers made with new structures. So we were induced, if not compelled to talk to the farmers personally and on their premises. Of course we took in account many other 'actants' as well.

### **Main aims of the paper**

Research problems are therefore:

- The types of connections between farming and tourism in Austria's mountain region, and their determining factors;
- The reasons for failure or success.

If we wonder how farming and tourism came together, we can see two ways: Farm-tourism originated either in careful consideration and experience of the actors or in official projects of touristic or agricultural experts. What we intend to show is: theoretical arguments may set a goal, but the results of the turnover do not automatically comply. The chief aim of rural policy is – despite all structural improvements – to keep agriculture in place. Our thesis is that this works best with family holdings with diversification, for they are least likely to give up farming.

### **Main results**

#### **Reflections on farming and tourism and their determining factors**

For a successful bargain, supply and demands have to match. But in farm-tourism, offers (or supply) as well as expectations (or demands) must come from both sides: the farms have to meet the expectations of the guests, tourism has to adapt the selection of target groups to the inventory resources of the farms not to forget the sustainable use of nature as resource. At any rate this means a constant process.

#### **From the perspective of the farmers**

- Farmers can offer rural facilities for Alpine sports in summer and winter. At the same time there are enough opportunities for soft tourism close to nature. Different types of rural vacation are possible with specifications for different requirements. Many peasant families offer not

only accommodation but catering for their guests. Healthy organic farm food can thus be enjoyed at the place of origin. Rural specialties are of high quality nowadays and a delicious treat. There are special offers for families with children, for disabled persons, for riding on horse back, for cyclists and more. Individual personal attendance is possible when desired. In addition guided tours are often available and in most places regional handicrafts may be purchased as souvenirs.

- Farmers though expect respect of their privacy, and at times some regard for their difficult time management. They usually charge less than commercial accommodations, but this money is a substantial part of their income. Since they are liable for the safety of their guests, it is only fair and wise that warnings of dangers are taken seriously by the tourists. This regards not only technical devices, but especially when encountering animals. A distraught mother cow can be a serious danger, for example.

### **From the perspective of the tourists**

- Tourism periodically needs new challenges. Mass tourism is out, yet a wide range of the public has to be reached and the desires of the guests have to be satisfied. There are different target groups with varying demands, so the types of catering and accommodation have to be flexible. The destinations have to correspond to the lifestyle of the target groups.
- Tourism offers farmers additional income (the workload largely falls on the women, though). Modern tourism favours the development of new forms of marketing. In many cases the utilization of either public or private infrastructure is intensified and costs can be paid off sooner. Tourism offers the possibility (under certain circumstances) of new jobs. The call for healthy organic food reduces the marketing problems of farm products and makes direct marketing more profitable.

### **Matching supply and demand**

If offers and expectations are to match, new forms may arise like the foundation of the association of 'Farm Holidays'; the establishment of apartments on the farm; Almdörfer ('villages' formed by several huts on the pasture); snack stations on the Almen; the movement 'Hiking below the summits'; the festivals of the 'Farmers' Harvest' and the development or extension of local events. Social connections appeal to both hosts and guests and may increase their quality of life. Traditional appearance and modern convenience is standard quality on farms nowadays. This is no concession for tourists, but modern technology in the kitchen as well as in the barn is a matter of course nowadays.

Fringe benefits deriving from the partnership of both farmers and tourism are ski runs, lift-partnerships, guided adventure tours, carriage and sleigh rides. Along the way, rental of unused Almhütten has developed as a new real estate branch.

### **Reasons for linking farming and tourism**

It is of vital importance in Austria that farmers and tourism cooperate: To be attractive for guests, the countryside has to offer highlights, accessibility and infrastructure. Run-down and forlorn farms as well as ruined abandoned roads are no appealing sight, nor do endless primeval forests offer a worthwhile trip. But as a consequence of rationalization and mechanisation, mountain pastures were not needed any more. The decay of the Almen (summer farms) around the 1970s showed the results of such a tendency: the grassland of mountain regions was gradually covered by shrubs and trees. This process was stopped and partially reversed, for the tourist managers found out, that tourism cannot thrive without regional culture, infrastructure and the partnership of farmers. Therefore in 2006 Salzburg's leading tourism marketing agency SLT (SalzburgerLand Tourismus GmbH) started an overall campaign called 'Almsommer', to encourage guests to hike 'below the summits', rest, have a snack at an Almhütte and enjoy the company of the Almfolk. Tourism in Austria is very tightly tied to landscape. Mountain farms guarantee a small scale interesting cultivated landscape with little costs for tourism management. At the same time tourists are prospective customers for mountain food and farm lodging. Without regional culture and infrastructure tourism would decline and endanger Austria's economy and trade balance.

The most important insight is a simple one: the main endeavour has to be object related. In any case, a close analysis of existing possibilities is necessary before choosing an additional new branch of business. The result of the analysis of the individual holding has to show enough capacity to run such an intended 'joint venture'. The location has to be attractive for a certain target; the premises have to be adaptable and the capacity for work apt and sufficient. Without these prerequisites and only with the single motivation to secure some subsidies, the project is bound to fail. Investment subsidies are what they are meant to be: supplements.

Tourists' requirements differ according to what is called 'target group'. What they have in common is: the wish for modern comfort as far as sanitary standards are concerned; sound farm food; personal contact with the hosts and insights in to the work on the farm and its animals.

The danger in this respect is to set a new business 'on the green meadow', just because something like it succeeded somewhere else. Thriving enterprises usually develop slowly, comprising two or three generations with maybe originally different professions engaged in the work on the farm.

## **Development of accommodation and services**

### **From private rooms to apartments and guest houses**

Accommodation developed gradually. Private room rental is today still one of the main pillars in farm tourism. It increased on a broad basis in post-war times. As far as farms are concerned it was in step with the progress of technology and the decline of paid farm labor. Unused rooms have been adapted and rented out as holiday accommodation.

Diversification does not only mean additional income, it also means additional work. Room rental especially increased the workload for the farmer's wife. A way out for the women was apartments: cleaning is required after each departure, but no service during the stay, which makes time management easier (A-12, 2003). As a consequence, in 2009 more overnights in farm-apartments and guest houses were counted than in rented rooms (Lebensministerium, 2010, 203). The number is slightly declining in both forms, but considerably less for apartments.

'Farm-Holidays' was founded in 1992 as a private association to secure certain quality standards and optimize marketing possibilities. About one fifth of the farmers who let rooms or apartments are members. The farms specialize according to their capacity for target groups. In a way it is a success story, but it puts some strain on the farmers' wives to keep up with the criteria. Partly the stress is self-created, if too many different activities are pursued (B-36, 2004; C-45, 2004). The membership fee is very high, and in some cases the results of the joint marketing is disappointing. Therefore a number of local associations which offer a similar service for much lower marketing costs exist with their own brands and only an insider can tell the difference. In some way they are free-loaders, taking advantage of the good will of 'Farm Holidays'. Anyway, very many farms renting rooms, apartments or Almhütten have their own homepage and have started their own promotions. 'Farm Holidays' try to match farm and guests. This way it is possible to meet the guests' expectation without putting too much stress on the host family.

Nowadays all different forms exist side by side, together with traditional village farm-inns and different categories of hotels

### **The importance of the location**

Matching project and location is a sensitive issue and needs accurate consideration, as shown by two examples:

Example A: When a regional bike path was established close to his farm, the farmer built a guest house and restaurant as a pull-in for the bikers as well as for a holiday option. Food from the farm is offered in the restaurant as well

as in the farm shop. Chores are divided: the farmer's wife runs the kitchen, looks after the book-keeping and the shop. The farmer takes care of the farm, the purchase, authority affairs and the service. The grandfather and some part-time workers complete the team. (B-33, 2004). It is a booming business.

Example B: A well-known farm restaurant in the vicinity of the city of Salzburg built two very appealing single apartment houses, hoping to rent them to guests of the Salzburg Festivals. Almost in vain: the apartments were too close to the noise of the evening sessions in the nearby inn.

### **Decisions about the staff**

To hire an employee other than a member of the family needs most careful consideration. Guests have to be attended to whenever required. Foreign staff are bound to the terms of collective agreements. This is a serious argument to confine the work to family members (SM/L-2, 2008), holiday interns (G-6, 2008), or hourly-paid farmhands. This is especially true for Almschänken [(huts with food and drinks of own farm production according to special legal provisions (GewO 1994)], (G-4, 2008). A farm family can always fall back on their own personal reserves. Who, what, when can be negotiated within the family. A family holding depends entirely on teamwork, otherwise it disintegrates. When dealing with diversifying farmers it is most striking that all families seem to be intact. But it is the other way round. Only with an intact family diversification is possible. Problems are possible, but solutions have to be bearable.

Good-humoured, industrious hosts awaken the desire for closeness in the guests. This can lead to friendships (B-26, 2004), or cause burn-out (B-36, 2004). Remedies are: private living room with 'no trespassing', separated breakfast and sitting room for the guests (L-1, 2011).

Time management and the wish for more privacy led to another form of accommodation: apartments. Their number almost equals the private rooms (Lebensministerium, 2010: 203). Farms offering accommodation ought to analyze accurately which type of guest matches their house and family. Within this range every effort has to be made to suit the expectation of the guest (B-29, 2004).

### **Expectations met and disappointed**

This impact should not be underestimated. Tourism managers try to find out about the likes, dislikes and expectations of the guests and make efforts to suit their wishes. Interest groups like the Chamber of Agriculture are obliged to take their clients' view into account. So both sides try to manipulate to some extent their own clients, both sides cater to them: but

both put the strain on the farmers, because it is their task to find individual solutions for conflicting interests:

Example A: A small community with many farms on very little even ground decided some years ago to join the LEADER project of Nature Parks, animated by the adjoining German National Park 'Limestone Alps'. It comprises many scenic jewels; a diversity of rarities in flora and fauna as well as possibilities for sports and health care. It was decided that eighteen farmers were to undertake official training by the Chamber of Agriculture to become guides. They all passed their exams and were looking forward to their new jobs. At the start of the season a different guided tour was offered almost every day, each one called for a minimum number of participants and was at a high price level.

After a short test run the guests found out that if the required number of participants was not reached, they went to the meeting point in vain – the trip did not pay enough for the farmer and so it was cancelled. Furthermore, if you thought the price was too high, you only had to board the hiking bus to the nearby National Park of Berchtesgaden – they had a similar offer of guided tours - without charge and within a few minutes' drive. And, if for some reason you missed a guided tour you were really interested in, you had to wait for three weeks for the next chance – then as a rule your vacation was over. That meant: this part of the program was then a complete failure. It took a couple of years to alter the conditions and revitalize a stripped-down program. It is working now, but the farmers engaged were frustrated and disappointed (SWN-2, 2008).

The above case is an example of parochialism: none of the institutions involved a thought outside the box. Farmers with touristic experience and local tourist agencies try to take the view of the guests to be efficient and are striving to meet their wishes. The indirect power of the guests is their demands – otherwise they will not come.

On community pastures the 'Almhütten' (huts, lodges) are either scattered all over, or form a 'village'. Cheaply constructed primitive villages of Almhütten (Almdörfer) for rent fail, but if they are *non plus ultra*, they thrive.

Example B: Almhütten forming a village are called an 'Almdorf'. Such an Almdorf was newly erected for touristic use in the Leoganger Steinberge. It is anything but a village of summer farms: it is a collection of chalets with traditional style-elements, modern convenience and sophisticated luxury. It belongs to a farmer who runs a restaurant nearby and charges about twice as much as a four-star-city-hotel would demand per night and person. The target group are guests who are already bored and tired of five star hotels! The Almdorf is fully booked – and an example of economic success!



What are the reasons for such differing results? The farmers of the Nature Park focused on their own expectations: a lot of additional income in a short time with little effort. They neither thought about what their guests wanted (even who their customer could be: which target group they were addressing), nor who their competitors were. Their reward was frustration. The owner of the Almdorf was able to take into account the point of view of guests: he gave them what they expected: romance, new aspects, convenience and luxury. As a reward the farmer got back a thriving business, best use of his farmland, new jobs and high income.

Marketing projects are often based on the idea of raising the farmers' income by 'educating' the customers to buy regional products at a (sometimes) higher price. In this manner marketing happens to focus on the farmers' needs instead of the customers' wishes – and sometimes fails, because of incompatible interests.

Example C: to tell the guests on the menu they should choose a certain dish because the 10% additional charge goes to 'the poor farmer' was useless. It led to a complete flop. Later on the same regional meat specialties on the menu were backed by an attractive description - at the same price as before - and it was a resounding success.

The inclination to buy will develop itself by means of smell, taste, appearance, name and presentation of food and the connected service. If the price reflects the quality, it need not be explained in more detail (This refers not only to gastronomy as purchasers of regional products, but to the farm-shops, too).

### **Geomorphology**

The shape of the landscape is an aspect one may not ignore, because it determines the way a region is cultivated, which is in the end the basis for touristic use. In the Central Alps (G-3, 2008) narrow deep-cut side valleys result in one pasture being owned by a few farmers with one single shelter for the people taking care of all the animals. Thus for hikers and mountaineers such a hut on their way can be a refuge with food and bed. In the Limestone Region large community pastures house a hut or lodge for almost each and every single farm, on average about thirty huts per pasture. By and large half of them are unused and are available to let (heifers or mother cow herds are only looked after once or twice a week). Usually one of these huts was eventually turned into a restaurant, run by a family member – regardless of commercial establishments nearby (SM/L-1, 2009). Official aims are of little regard: an Alm as tourist destination requires only one Almschänke. Exceptions are of course festivals, musical or sporting events. Advertising can do much ('Almsommer', 'Hiking below the Summits'), but not against established structures.

## **Institutions and regulations**

The relief of building codes and tax incentives can create a competition problem, too. Building codes and sanitary regulations have no validity on farms with lump-sum taxes, including their Almhütten (G-1:2008). But farmers often voluntarily take refuge in commercial law and prefer to invest and pay instead of being constantly under suspicion of exceeding their limits (C-45, 2004/11).

A farmer with a Mostschänke voluntarily took refuge in commercial law and preferred to invest and pay instead of being constantly under suspicion of tax invasion (C-45, 2004). A farmer and cheesemaker who sells regional specialties at his Almhütte described a similar situation (P-4, 2008).

Farms with lump-sum taxes and commercial guest establishments differ in the number of seats, in the kind of food, in sales, but above all in building codes and sanitary regulations (G-1, 2008).

Generally the touristic use of the summer farms is a success story. Bonus systems, supports and investment subsidies by the EU stopped the decay of pastures and cabins. They were either restored, rebuilt or enlarged and sometimes erected anew. The extra-income of farmers owning an 'Almschänke' often amounts up to 50% of the total farm-income - the limit for exemption of trade certification.

But Alm-gastronomy is under tension as far as commercial gastronomy is concerned. The regulations to aid the farmers create a competition problem, even more so as the farmers are successful with it.

## **Cooperation versus competition**

The question is, what makes a former poor region prosperous? Large scale cooperation has enabled farmers to build roads to the Almen to haul supplies up there. The location is most important for the sectoral selection. Tourist gathering points such as cable-car stations (C-49, 2004/2010), or bike lanes (B-33, 2004/2011) favour combinations of processing, sale and gastronomy. Yet experiences in the marketing sector show that the number of providers of a special product has to be kept low in the region, else the proceeds per person will be too low (B-38, 2004; C-27, 2004).

The residents of an area as a rule will not provide sufficient clientele to secure the farmers a proper income – it needs tourists from outside the region (although the touristic offers also address the local people very successfully!) Therefore Salzburg's tourism marketing agency SLT started the campaign 'Almsommer'. Similarly designed road signs give full instructions about parking possibilities, the grade of difficulty of the different hiking tracks and paths and how long it takes to reach the next Almhütte. This makes it easy even for complete strangers to plan tours and to hike 'below the summits'. The aim is to encourage guests to make trips to the mountain

pastures. Many elderly people in the region like to visit their friends on the Alm and make an 'Almroas' (trip to the pastures). Most almfolk know traditional, humorous songs or they yodel and play instruments. So pleasant, friendly 'sit-ins' regularly develop, comprising both residents and guests. Sometimes they are even arranged by a hotel-owner to entertain his guests on the Alm. 'Farmers' Harvest' festivals present rural culture and local food and extend the season until October. That leaves only two months for recreation and repair work for the hosts until the Christmas markets start and the skiing season begins.

A tourism expert in Großarl valley in the Tauern Mountains managed to explain to the members of his organisation that it paid for each one of them to cooperate instead of spreading envy and resentment. If they all worked together to build interesting hiking paths up to the Almen where it was possible for the guests to get refreshments and to entertain themselves, they would stay longer and would return more often to the hotels and lodges at the bottom of the valley. He proved to be right and Großarl valley is a most thriving region.

A sound competition may be a wonderful motivation for development. But in this very valley one of the farmers planned to expand the porch of his Almhütte and install 200 more seats. He was talked out of the project by his colleagues: mass tourism would ruin the charm and romance of the Almen!

The association 'Farm Holidays' (and similar local clubs) and hotels do not compete, but cooperate. Appealing destinations with Alm-catering make guests stay longer. Cooperation includes common advertising (regional Tourism Agencies). "An area can be only successful if each and every member makes efforts to give their best (G-1, 2008)."

## **Different forms of Distribution and Combinations**

### **Direct marketing**

The original idea of direct marketing was "Interlocking the individual stages of the supply chain (Brand, 2006, 107)". The aim was to eliminate the wholesale trade and keep the surplus value within the farm holdings. This shortcut between farmer and customer works with farm products, if the regional clientele is enlarged by tourists as consumers or if they buy farm products as a gift. Lack of tourists as consumers can only be made up by institutions like hospitals, nursing homes, barracks and so on.

Example A: A farmer with a secondary income as cattle dealer managed over the years to enlarge his holding considerably. His sons were engaged as farmer, butcher and inn keeper and the family established a restaurant, a butcher's and an organic farmers' market between a cable car station and

several commercial businesses near the German border. It is a booming combination with regular customers and a lot of tourists dropping by as well as visitors from the neighbouring state (C-49, 2004/10).

Example B: At the beginning of “Direct Marketing” in the mountain region of Lungau almost every village had at least one farmer engaged in the project. It did not last very long and almost all disappeared again: Lungau at that time had very little tourism and there were just not enough buyers of the products. With expanding tourism products like cheese, bread etc. is being sold directly by farmers again (A-14, 2003 and A-15, 2003).

Efficient marketing is only possible with enough purchasing power and enough buyers. In regions with vibrant tourism farmers are able to sell attractive products easily at reasonable prices for both sides.

### **Processing and marketing own primary products**

Effective combinations like accommodation and catering can be topped up by direct marketing of regional specialities and traditional handicrafts as souvenirs (B-33, 2004). Production, processing and the contact to the ultimate consumer are concentrated in personal unions (C-23, 2004/2006/20011) regardless of the premises’ altitude (A-10, 2003/2011) or the size of the holding. The surplus value of the products stays within the farm enterprise. If the load becomes too heavy, it may be necessary to drop business parts that do not pay or provide enjoyment.

Example: A successful farmer and gastronome in a remote area (A-10, 2003) reported that on his farm, rooms have been rented since 1967 and meat was sold after home slaughtering – which together did not amount to much income. Only since the year 2000, when a restaurant was built with cooking demonstrations and rooms were rented according to the criteria of “Farm Holidays”, 2/3 of the surplus value was earned through gastronomy.

As stated before, processing and catering are winning combinations. In Salzburg’s mountain grassland regions cattle breeding and dairy farming prevail. The primary products therefore are meat, especially beef, milk and dairy products. Regardless of whether regional products and regional dishes are served at a farm-inn, a hotel restaurant or at an Almhütte, it means publicity for the region, attraction for the tourists and in the long run more customers. A special feature in this way is homestead festivals of certain farms. Local food and drinks are served while a local band plays folk music for the guests and at the same time there is the possibility of visiting the facilities of the farm premises– it needs the tourists! The proceeds from Alm-catering during the summer months in some Almhütten

are higher than the income of the farm alone throughout the year. Many farmers keep the dairy-cows on the farm and haul the products for sale to the Alm (previously it used to be the other way round) to have enough time to tend to the guests on the Alm.

### **Attempts to overcome market barriers**

Meat is supposed to reach the tourists in restaurants, but sometimes official objectives collide. The chief products of mountain farming are milk and meat, but the supply of animals for meat production is limited. The aim of the project of keeping mother-cows was created to retain milk from the market, thus positively influencing the trend of prices. This is the reason why subsidies for alpine pasturing for 80% of the cattle are available. Starting at the beginning of June the cattle are walked up to the summer farms. The requirement for subsidies is that they stay there for at least 60 days. This way a 'summer hole' in meat provisions arises. There is a shortage of regional beef during the tourist season, and there is a surplus – and low prices – after the tourists are gone. Thus the same measure which helped to raise the price for milk put pressure on the price for meat.

In some parts of the country it is difficult for inn-keepers to obtain Alm-products to serve to their guests in summer, because this food either is consumed right on the Alm, or the tourists take it home. There is a slight chance for milk, cheese and butter, but animals to be ready for slaughtering are rare. Meat available at the end of summer season is too late to be used (HM-1: Tourism Chairman and Hotel Owner, 2008).

The purchase at the farmers' is difficult for many hotel-mangers with international visitors and their national tastes, it is more interesting for inn-keepers with middle-class clientele; a way to combine mass tourism and special offers (V-8, 2009). The problem with direct marketing is the limited amount (15 to 20 kilos/beef) of first-grade cuts of meat per animal and their limited availability. Thus direct marketing of meat to gastronomy has a serious allocation problem. Hotels and restaurants of some size used to have a kitchen-butcher and the necessary storage facilities. Today's cold storage rooms look different. No more hooks to hang up meat, but shelves to store vacuum packed pieces. The former way of working up meat is still in use at Tannenhof, the senior owner of the hotel being 'chef de cuisine'. Besides international dishes native specialties are to be found on the menu. Almost all the parts of meat are being used, not only the premium pieces. But this is an almost singular case and a dream for the future (TH: Hotel-Owner,-three stars, 2009).

Hotels and exclusive restaurants do not buy whole animals, but the animals have to be from certain farms and be processed by the local butcher. Today there are no more rooms to 'hang up' the animals, nor the machin-

ery to make sausages from cut off meat. Many farmers sell premium pieces privately, the rest is of little interest for a restaurant. Yet there are quite a few restaurants with emphasis on the skiing season with clients who like short and inexpensive snacks like pasta or meatloaf. These enterprises favour animals from farmers. The problem for the others is the cheap parts of meat and their comparatively high price (HM-2: Chef cook, 2009). In addition sanitary regulations require special slaughtering rooms, usually not available on a farm.

Depending on the size of the business there are three types of the so-called direct marketing – which in fact means ‘farm products by farmers’.

- A) Single farmers sell their products to single customers.
- B) A few farmers co-operate, form an association and sell their products to their customers in common.
- C) Activities are split either within an association, or between two co-operating groups: one is in charge of the offers and matches them with the customers’ orders collected by the other group for common sale.

Types A and B are well known. For type C examples of each version are to be found in the mountain districts of Salzburg. These are the main dealers to link farmers and tourists by providing meat via restaurants for summer guests and skiers in winter.

Example A: The firm ‘Tauernlamm’ was founded in 1976/77 by 15 farmers who started marketing their sheep. Today the company buys milk-calves and heifers from the ‘Erzeugergemeinschaft Salzburger Rind GmbH’, slaughters them, cuts them up and sells them vacuum-packed on order and by delivery-service or at different markets, as a dealer between farmers and gastronomy as well as between farmers and households. (V-1, 2009). Their partner, the ‘Erzeugergemeinschaft Salzburger Rind GmbH’ consists of farmers, who abandon their claim to the ‘Alpungsprämie’ (a subsidy for leaving cattles for a certain time on the summer farm) with ordered animals, because in putting them on the market they miss the time-limits for keeping them on the summer farm. The animals either stay at the farm during summer or are brought back from the summer farm in advance. To make up for the loss of the subsidy the meat is sold for an extra charge of 30 cents per kilo. Offers are collected by ‘Erzeugergemeinschaft’, the orders are placed with ‘Tauernlamm’. The sales are good. (V-4, 2009).

Example B: In the valley of the Saalach a somewhat differing solution developed. About 100 farmers, inn-keepers, and three butchers formed a common association: In this region cattle, calves and sheep are-slaughtered by local butchers again. The butchers buy the animals directly from the farmers, process and sell the parts to gastronomy (Butcher of Vermarktungsver-ein, 2009).

Direct marketing of single products on single farms means allowance, not income. Therefore, the true sense of the word does not always imply an efficient way. Although there are different forms of cooperation to compensate for deficits it is a concept, which needs to be revised. It should be called something like 'Farm Products sold by Farmers'. Anyway, distribution of farm products is closely bound to tourism. Marketing farm products is a separate branch and still needs much attention and innovation.

### **Concluding remarks**

In order to make the link between farming and tourism a success certain requirements are indispensable:

- thorough analysis of the farms' capacities as well as of human resources;
- cooperation of the whole family, networking with colleagues and authorities;
- a careful start and appropriate development: never put anything "on the green meadow";
- vocational training: diversification implies many professional skills and knowledge;
- match farm possibilities and guests' expectations by taking their views into consideration;
- specialisation, flexibility and response to changes in the pattern of demand; improvement of time management whenever possible: tourism puts more strain on female family members than on males;
- assure the quality of life for the peasant family by creating the possibility of retreat for them. It prevents the danger of burn-out.

Success and failure do not happen, they develop, and therefore an active attitude is necessary to meet challenges. Goals and expectations do not coincide, but goals and expectations are to be made compatible. This may require time and effort. Consequences are not always predictable. They can be undesirable, unintended, or unexpected but they ought to be handled. The deeper the analysis, the greater the chances of success. Never try to just turn over a promising idea. Analyze the capacities of your own business and those of your environment. Then decide.

Much emphasis is placed today on authenticity. If one considers that even tradition was modern some time ago, it is sufficient to erect buildings with authentic material, functional and stylish, but allow some modern comfort in accordance with the target groups. What counts more is: success can bear the dangers of sprawling dimensions, which ruin the touch of romance and the feeling of being close to nature. As the saying goes: 'thousands came to enjoy the quietness'.

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We also want to thank the Managing Director of the Chamber of Agriculture in Salzburg, Mag. Nikolaus Lienbacher. His assessment of this article has been very encouraging, especially the statement that it is of practical value.

## Glossary

*Alm*: mountain pasture, summer-farm

*Almdorf* (*plural: Almdörfer*): several lodges built close together

*Almhütte*: a hut/cabin/lodge on a mountain pasture to shelter the personnel working on the Alm

*Almroas*: a trip to visit Almen and Almfolk

*Almschänke*: an Almhütte where snacks are served

*Almsommer*: a series of events on Almhütten

*Alpungsprämie*: subsidy paid for keeping cattle a certain time on the Alm

*Erzeugergemeinschaft Salzburger Rind GmbH*: Beef producer group Salzburg, limited company

*Gewerbeordnung*: trade regulations

*Salzburger Land Tourismus GmbH (SLT)*: Tourism Company Salzburg, limited

*Tauernlamm*: lamb from the mountains

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A. Koutsouris<sup>1</sup>  
I. Gidakou  
M. Kokkali  
M. Dimopoulou

## **Agritourism in opposition to agriculture? Two Greek case-studies**

### **Introduction**

Agritourism has been a component of the EU, and therefore of the Greek policy for the development of the countryside since the mid-1980s. Agritourism was initially meant to function as an alternative means towards the improvement of farm structures and, through the obtainment of supplementary income, to enhance farm succession rates as well as the prospects of rural populations to stay in their native communities (e.g. EEC, Reg. 797/85).

This strategy was subsequently differentiated along with the emergence of concepts such as integrated (and sustainable) rural development, endogenous development and multifunctionality which, in turn, transformed the development rationale. The Community Initiative LEADER pioneered in the implementation of projects incorporating the new rationale and thus opened up the opportunities for non-farmers and non-residents of the target areas to access the available financial assistance in order to establish agritourism related businesses (Koutsouris & Hatzantonis, 2002). In the Greek case, the fragmentation of the responsibility for the implementation of such a rationale (e.g. Giagou, 2000) resulted in the financing of such businesses via multiple programmes without either coordination, a clear definition of the 'product' or a certain legal framework.

A consequence of such a trajectory, in Greece, has been the lack of any systematic register of agritourism related businesses and their owners which would allow for the thorough exploration of the 'agritourism

<sup>1</sup> Corresponding author (koutsouris@aua.gr).

phenomenon' as well as the design of a coherent national strategy for its development. Nowadays, relevant information comes from a number of case-studies which, nevertheless, provide useful insights on the contribution of agritourism to local development, the variety of the established agritourism businesses, the quality of the products and services offered, relevant cooperative schemes, etc. (see, inter alia, Anthopoulou *et al.* 2000; Gidarakou *et al.* 2000; Emmanouilidou *et al.* 2000; Iakovidou & Partalidou, 2002; Partalidou, 2005; Sfakianakis, 2000).

However, some quite important issues have not been explored. Such issues concern, among others, the relationship between agritourism and farming (i.e. the contribution of the former to the survival or the abandonment of the latter, including farm succession), the characteristics of agritourism entrepreneurs and thus the contribution of such businesses to the local economy as well as the economics of agritourism related businesses and their prospects (as standing alone businesses or in conjunction with other sources of income).

Given such an issue this piece of work aims at exploring the characteristics of agritourism entrepreneurs (and their households), their origin and residence in relation to the area where their agritourism businesses are established as well as the relationship between gender and entrepreneurship. It further tries to trace the degree to which farmers take advantage of the opportunities and get involved in agritourism. Additionally, it attempts, through an approximation at household level, to compare the incomes earned from agritourism and farming as well as to estimate the (succession) prospects of both activities (agriculture and tourism).

The current paper is based on the results of two different case studies: the first one concerns the Dorida municipality, Fokida Prefecture (Sterea Ellada region, southern Greece) a barely known destination; the second one concerns the Lake Plastiras area, Karditsa Prefecture (Thessaly region, central Greece), one of the most well-known rural tourism destinations in the country (see: Koutsouris, 2009).

### **Theoretical background**

During the last few decades, the countryside, all over the developed world, is been challenged as never before; it faces unprecedented change (characterised as 'rural restructuring' by Marsden, 1998), the pace of which is considered to be increasing. Issues such as the extensive restructuring of agriculture, population decline, the downsizing of services, degradation of the natural resources as well as counter-urbanisation trends are indicative of such a process (Varley *et al.* 2009). As a result, the functions of agriculture and the rural space are transformed from production-orientated to novel ones aiming at the satisfaction of consumption-type demands (Sharpley & Sharpley, 1997; Potter & Burney, 2002).

In terms of theory, such changes triggered the debate on the shift from productivism to post-productivism and thus a new, post-productivist or multifunctional model (or regime) for agriculture (e.g. Ilbery & Bowler, 1998; Lobley & Potter, 2004; Maye *et al.* 2009; Wilson, 2008). Multifunctionality, a key-term in this debate, is understood to relate to the combination of resources available both at the farm level and beyond and the creation of synergies between different fields of activity and between different levels and actors; it thus provides both the need and the opportunity for increased levels of pluriactivity and multiple job holding (Knickel & Renting, 2000; Robertson *et al.* 2008). Furthermore, van der Ploeg and Renting (2004) have defined rural development as a boundary shift and distinguished between three types of such boundary shifts: deepening (focusing on new farming activities), broadening (referring to on-farm but non-agricultural activities, including agritourism) and regrounding (with respect to efficiency farming and off-farm gainful activities or pluriactivity).

Meanwhile, pluriactivity, diversification and multifunctionality<sup>2</sup> have emerged as a fundamental component of the CAP strategy towards rural development, under the umbrella of the 'sustainable (rural) development' rhetoric. Especially the endorsement of agritourism development policies was founded on the understanding that through tourism the rural household can diversify its income generating activities which, in turn, would make it possible for its members to live in the countryside based on agriculture and the utilization of its resources (see, *inter alia*, Brandth, 2005; McAreavey & McDonagh, 2011; Page & Connell, 2001; Park & Yoon, 2010; Van der Ploeg & Renting, 2004). The relationship between tourism and agriculture becomes obvious in the definition of agritourism in countries such as Italy where, in quite an early stage, the relevant legal framework had been developed with agritourism being, since 1985, defined as "activities of hospitality performed by agricultural entrepreneurs and their family members that must remain connected and complementary to farming activities" (Sonnino, 2004: 286).

In Greece the emergence of agritourism has been quite late. The first signs of agritourism appeared in the islands and coastal regions during 1960s, however in the context of a dynamic development of mass tourism - thus not corresponding to any particular policy framework or guidelines. The idea of agritourism started playing an important role in the planning of the country's local development policy only after the country's accession in the EEC/EU in 1981, stimulated by the latter's agritourism programmes for the diversification of the rural economy in the mountainous and disadvantaged areas. Within such a framework, till the late 1990s, the relation-

<sup>2</sup> The further elaboration of such contested concepts is not among the aims of the present paper; for a discussion see: Aguglia *et al.* 2011; Knickel and Renting, 2000; Robertson *et al.* 2008, Van Huylenbroeck *et al.* 2007; Wilson, 2008.

ship between agritourism and agriculture was made obvious through the requirement that one should be a farmer, permanent inhabitant of the target-area, in order to be eligible to access the available, at the time, financial support/incentives<sup>3</sup> (Ministry of Agriculture, 2000). Since the early 2000s though, the framework of the criteria concerning the potential investors' occupation and origin was differentiated owing both to farmers' diffidence in getting involved with tourism and the strategy of integrated rural development, dictating the mobilization of resources beyond the ones available by local farmers or residents.

Indeed, around that time, the theoretical debate and the call for sustainable production systems facilitated the EU decision-makers' shift from sectoral towards spatial, multisectoral and integrated policies for rural development (Walford, 2003). Sustainable rural development thus became the cornerstone of the EU, national, regional and local development policies; hence, the diversification of economic activities was actively promoted through the third and fourth Rural Development Programmes (2000-2006 and 2007-2013, respectively) (EC Reg. 1257/1999, 1698/2005). In this respect, both rural inhabitants and others were allowed to access the financial support provided for the development of new businesses in the rural space; in parallel, public bodies (especially the local authorities) were financially supported for the protection of their cultural and natural resources. The Community Initiative LEADER is characteristic of such an innovative approach involving the local population and agencies in local development processes aiming at the mobilization of local resources, with emphasis on the underutilized human and material resources of the rural families (notably the farming ones), towards the creation of additional income sources.

In Greece, the major push towards integrated local development was provided through the LEADER Initiative addressing the development needs of the country's less favoured and mountainous areas (LFAs). Additionally, the Integrated Programmes for the development of the rural space (IRSDP), also addressing the Greek LFAs, was first implemented in the framework of the third Rural Development Programme (2000-2006). The IRSDP scheme continued in the fourth RDP (2007-2013) as a result of the persisting problems (i.e. declining agriculture and population) and the perceived advantages (i.e. the availability of resources such as the intact natural environment, the diversity of landscapes and the rich cultural heritage) of the country's LFAs; within the sustained interest on integrated rural development and multifunctionality, LFAs continued to be the main target-areas in terms of the need for local economic diversification.

<sup>3</sup> See also: Iakovidou, 1995.

Yet, contrary to the developments in countries with a 'tradition' in agritourism (e.g. Italy, France, Germany), in Greece there is still lack of a national legal framework for soft tourism. The categorization of agritourism accommodation businesses follows the standards of the National Board of Tourism which does not differentiate between mass and soft tourism, especially agritourism. Moreover, the anxiety for the uptake of the available EU funding (Koutsouris, 2008) along with the fragmentation of competency as well as the lack of coordination between agricultural, tourism and land use policies jeopardize agritourism development; they allow for the establishment of dotted (often, low-quality) infrastructure and businesses which do not substantially contribute to either households' incomes or local development; moreover, many of these businesses have been established in already or potentially saturated, in terms of tourism, areas.

Turning to agritourism development, an important issue raised by Busby and Rendle (2000) concerns the fact that farmers often lack appropriate skills; they may be isolated, without prior experience or training in tourism. Moreover, age, the innovative character of the new activity and the lack of sufficient capital (see: Koutsouris, 2008) are factors that prevent farmers from engagement with tourism related activities.

According to Garrod *et al.* (2006) tourism and farming, while overlapping to a certain extent, differ quite substantially. Tourism-related activities imply the development of a new identity on the part of the land owner (such as in terms of communication, politeness, the development of positive experiences for the guests, etc.) which diverge from those of the farmer. Furthermore, since identity is related to occupation, it has been shown that, on the one hand, the more a tourism entrepreneur the farmer becomes the more s/he dissociates her/himself from the farmer identity and, on the other hand, that s/he restricts her/his involvement with farming or abandons it altogether (Brandth, 2005; Sonnino, 2004; van der Ploeg & Renting 2004)<sup>4</sup>.

According to the OECD (1994), while farm-based tourism is a means to alleviate the problems agriculture faces, it is not a panacea. The inability of small farms to provide accommodation facilities, the indifference of large farms to diversify towards tourism, the indifference of local authorities and farm coops and professional organisations to contribute to the improvement of infrastructure and the promotion of their areas as tourism destinations, the lack of (natural or cultural) attractions, and distance are among the factors that do not allow especially small farms to get involved. Notwithstanding other factors, it has to be underlined that Greece, with

<sup>4</sup> According to Sonnino (2004), many of the farmers involved in agritourism in Maremma (Castelborgo, Italy) would have abandoned farming if only they were not restricted by law to continue farming; in parallel, despite expectations, no investments on the farms, coming of the agritourism earnings, were detected.

an average farm size of around 5 ha., is a country where small scale farming predominates; this is indeed more obvious in the less favoured areas, which have been the areas mainly addressed by agritourism development programmes. Moreover such areas are characterised by deterioration of the social web, aged population and lack of financial resources on the part of locals (see: Anthopoulou *et al.* 2000).

As far as research on agritourism in Greece is concerned, it has to be mentioned that it has largely neglected issues such as the economics of agritourism businesses, the businesses' contribution to families' incomes (and its comparison to the families' farming incomes) and their prospects (including succession). Instead, as aforementioned, research has mainly focused on the services (i.e. variety and quality) provided by agritourism businesses, the guests' characteristics, tourist occupancy and the like. Research has also addressed the relation between gender and agritourism pointing to the difficulties pertaining the development of women's entrepreneurship but, on the other hand, the increasing women's interest for collective ventures (through women's cooperatives operating accommodation units or utilizing the local culture relating to crafts, folklore, gastronomy, etc.) as well (Anthopoulou, 2006; Gidarakou, 2007; Gidarakou *et al.* 2000; Kazakopoulos & Gidarakou, 2003; Koutsou *et al.* 2003; Papadaki-Klavdianou, 2007)<sup>5</sup>.

Regarding women, according to Giraud (1999) agritourism, as an occupation and income generating activity, is preferred than agriculture. Women's endeavour to acquire occupational identity and utilise their labour force, which was made redundant as a result of the modernisation (particularly mechanisation) of agriculture, motivates them to get involved with agritourism; in other words, agritourism provides women with the opportunity to elevate their occupational status and contribution to the family income. Research has shown that, for example, through agritourism women can utilise their specific qualities (such as their communication skills; Gidarakou, 2008; Skordili, 2005) and professionalise activities with which they are usually involved in the framework of their household economy (see: Bock, 2004; Gidarakou *et al.* 2000; Nilsson, 2002). As Bock (1994) underlines, agritourism (as an employment field) is female; at the same time though, women's entrepreneurship is lagging behind in rural areas (Gidarakou *et al.* 2000; O'Hara, 1994; Ventura, 1994).

Research in Greece has shown that the presence of women as owners/managers of accommodation units is notable, approaching 40% (Vasileiadou, 2008; Grava, 2011). The presence of women in agritourism is also remarkable in LEADER+ and IRSDP in the third RDP (59% and 37% respectively; Gidarakou, 2008). Nevertheless, such numbers do not, for a variety

<sup>5</sup> It is estimated that nowadays, around 200 such coops are in operation, with the first one been established in 1983.

of reasons (such women's compliance with the family livelihood strategy), straightforwardly imply that women are actually involved with the running of the agritourism businesses (Gidarakou *et al.* 2008).

With respect to the economics of agritourism related businesses, recent research addressing the owners of accommodation units in mountainous Korinthia (Peloponnese), a well-known tourism destination near Athens, provides interesting insights (Grava, 2011). In the first place, quite a number of accommodation units' owners live in Athens (44% before and 31% after the establishment of the business); overall, their majority (68%) does not stay permanently in the area and their main occupation and source of income is not agritourism. Furthermore, businesses are differentiated depending upon the owners' relationship to agriculture (i.e. not involved in farming - without a farm; farming being a supplementary occupation; or, farming being the main occupation). Research revealed that the households whose owners are either not involved with farming or are involved but as a secondary occupation operate their accommodation units with loss; i.e. the average operational cost of the accommodation unit (mainly comprising loans as well as the salaries of permanent staff - the owners do not permanently live in the area and have to hire staff to operate their business) surpasses the revenues. On the contrary, the accommodation units of the households whose owners are primarily occupied in farming contribute substantially to the household's income (on average 24,000 €); this is so since these households have lower loans as well as fewer permanent staff (i.e. they only occupy short-term, temporary staff). As Page and Connell (2001) have argued family labour tends to be the main resource utilized in farm tourism enterprises. Other research findings in Crete (Vasileiadou, 2008) show that according to the majority of the owners (i.e. their own estimations) the income from tourism is generally low to moderate (up to 15,000 € per year).

As far as the succession of agritourism businesses is concerned, it has to be stressed that it largely depends on the business's profitability, a topic which nevertheless has not, so far, attracted the attention of agritourism research. Grava's research (2011) provides some hints by showing that currently the great majority of accommodation owners' children in mountainous Korinthia are not occupied in either agriculture or tourism; additionally, while quite some children 'give a hand' in their parents' agritourism businesses this is not the case for farming. The case of succession certainly is more complex as compared to its viability under the present owner. Some indications from Greece, concerning rural women's businesses or cooperatives, are not encouraging; the prospects of their children to become involved are bleak; no matter if businesses concern accommodation or other tourism related activities succession prospects are poor. As a matter of fact, research shows that such businesses have been established to provide (alternative) employment to the current own-



er(s) rather than with a view to their heirs (Iakovidou *et al.* 2006; Gidarakou, 1999; Gidarakou *et al.* 2000). Nevertheless, under the current economic crisis and the huge unemployment rates among the younger generation it is possible that the latter's employment orientations have changed.

Finally, the expectation that agritourism will support the continuance of farming, by the household and especially by heirs, has not been dealt with. The indications provided by Grava (2011), based as aforementioned on the involvement of children in both activities, point to rather pessimistic prospects.

## **Case study areas and research methodology**

### **Research areas**

Following, the results of two Greek case studies are presented. The first case study concerns the Dorida municipality, part of the Fokida Prefecture. It comprises 55 villages, 80% of which are characterized as mountainous. Farms are very small (average 1.7 ha.); almost two out of three are involved in plant production with olive tree plantations dominating the landscape. The great majority of the rest are mixed farms; animal production concerns sheep and goat husbandry. Agriculture is characterized by its low competitiveness owing to the high costs of production and difficulties in the transportation and thus the marketing of the produces. The area has quite a number of picturesque mountainous villages built according to the traditional area's architecture; there are also opportunities for trekking as well visiting religious sites and folklore museums. The presence of 77 cultural clubs, organising a wide range of cultural activities in the area, is also noticeable, since it enhances the attractiveness of the area. Nevertheless, the area is a rather unknown tourism destination.

The second research area concerns a Less Favoured Area (LFA) around the Lake Plastiras, including 14 villages. The Plastiras Lake is an artificial one; it was constructed during the 1958 - 1962 period covering a previously fertile mountainous plateau to satisfy the needs for water supply and irrigation of the city of Karditsa and another 38 plain towns and villages, and the production of electricity. As a result, the area experienced a severe population exodus (Koutsouris, 2008).

Despite its natural beauty and value, as well as religious monuments and other attractions (cultural festivities, etc.) the lake area had not been considered as an important resource for the surrounding communities until 1987 (Kasimis *et al.* 2009). Then, a local development project designed on behalf of the Prefectural authorities indicated rural tourism (with an emphasis on agritourism and various other forms of alternative/soft tourism) as the path to development. Following, the construction of the first hostels by the local authorities, the nation-wide marketing of the natural beauty of

the area, public investments in infrastructure, a number of projects as well as, on a later stage, private investments triggered by the local LEADER II (and thereafter LEADER+) helped to change the area's profile thus transforming it to a major tourism destination among Greeks (Koutsouris, 2009).

Agriculture in the area has, since 1961, experienced a serious decline in terms of the numbers of farm holdings, cultivated lands and animal numbers. Farms are small sized (average of 1.3 ha. per farm) and fragmented (4.5 parcels per holding on average). Nowadays, fallow lands and grasslands account for almost half of the agricultural land. Productivity is low due to the fragmentation of properties and the steep sloping of the land. Livestock farming is still 'traditional'; it is labour intensive with low rates of capital investment and heavily dependent on pasture during the summertime and autumn (Koutsouris, 2008).

## **Methodology**

Data were collected through face-to-face interviews with agritourism entrepreneurs based on structured questionnaires comprising both closed and open-ended questions. It is worth mentioning at this point that in rural Greece accommodation is the dominant form of the newly established agritourism activities followed by the renovation or the establishment of catering businesses, i.e. restaurants as well as neo-traditional taverns and coffee shops; other tourism related activities are rather rare in the countryside.

More specifically, in the Dorida case, the research (2011) addressed all the entrepreneurs who operated accommodation units in the area; 41 out of the 47 owners were reached and interviewed.

The current paper also draws on part of the data collected at the Neohori village in the Lake Plastiras area (2007). Neohori is the core of tourism development in the study-area (25 out of the 70 accommodation establishments in the Lake's 14 communities are found in Neohori). The survey followed a snowball technique among residents with tourism related activities; 18 (out of 66) entrepreneurs were interviewed.

## **Results**

### **The Dorida case**

#### **Entrepreneurs' identity**

The majority of the accommodation owners are relatively young when compared to the average age of farmers in the country<sup>6</sup>; more spe-

<sup>6</sup> According to the 2001 Census, 45% of the farmers (heads) are between 45-64 yrs old and 31% over 65.

cifically, 60% are up to 55 years old (22.5% under 45 years) and 10% over 65 (Table 1).

Table 1 – *Entrepreneurs' age and gender (Dorida)*

Age clusters	No.	%	Men	Women
Up to 45 yrs	9	22.5	8	1
46 – 55	15	37.5	10	5
56-65	12	30.0	9	3
> 65	4	10.0	4	0
	40	100.0	31	9

The majority of the owners (85.4%) originate from the study area. Just over half of them are permanent inhabitants of the study area (56.1%); the rest of them either stay permanently outside the area or move (commute) to the area according to their businesses' needs (Table 2). Additionally, the fact that the numbers of the owners who live permanently in the area has decreased after the establishment of their business (56.1% vs. 65.9%) has to be stressed.

Table 2 – *Entrepreneurs' origin and permanent residence (Dorida)*

Place	Permanent residence today		Place of birth		Past residence	
	Entrepreneurs No.	%	Dorida No.	Other No.	Dorida No.	Other No.
Dorida municipality	23	56.1	23	0	21	2
Outside Dorida municipality	11	26.8	6	5	4	7
'Commuters'	7	17.1	6	1	2	5
Total	41	100	35	6	27	14

Their educational level is quite high: 53.7% have completed the senior high school (Lyceum) with 10 of them having completed tertiary education. Such findings are in line with the findings of other studies also pointing to the accommodation owners' relatively high educational standards (Kokkali, 2007; Vasileiadou, 2008; Grava, 2011). Only 3 of the owners have just primary education – all farmers and permanent residents; in general, permanent residents' educational attainments are lower than that of the non-permanent residents.

Only 8 among the 41 owners (19.5%) are primarily occupied in farming (with 3 of them also running butcher shops); 7 of them are permanent inhabitants of the area, corresponding to 30.4% of the owners who dwell permanently in the study area (Table 3). Agriculture is also negligible as a secondary occupation; it only concerns 2 of the area's permanent in-

habitants. As far as spouses are concerned, agriculture is the primary occupation for only 3 of them (none of the spouses declared farming as a secondary job). Nevertheless, 22 of the owners declare that they are owners of agricultural land; with the exception of those who declare farming as their primary or secondary occupation, the rest claim that they are hobby-farmers or rent their lands. In general, those who own agricultural land originate from the area; in parallel, their majority (77.3%) stay permanently in the area, are older and less educated. It can thus be argued that the expectation that agritourism would contribute to the improvement of farm structures and enhance agricultural multifunctionality does not seem to be fulfilled.

Table 3 – Entrepreneurs' main and secondary occupation (Dorida)

Occupation	Main occupation				Secondary occupation			
	Total (no.)	Permanent residents		Total (no.)	Permanent residents		Total (no.)	%
		%	(no.)		%	(no.)		
Agriculture	5	12.2	4	17.4	2	4.9	2	8.7
Agriculture* and butchery	3	7.3	3	13.0				
Accommodation	18	43.9	10	43.5	23	56.1	13	56.5
Tavern	2	4.9	2	8.7				
Free lancer	10	24.4	3	13.0				
Business abroad	1	2.4	-	-				
Other	2	4.9	-	-	1	2.4	-	-
None	-	-	-	-	14	34.2	7	30.4
Total	41	100	23	100	41	100	23	100

\* Specifically, animal breeding.

At the same time, tourism is not the main occupation of the accommodation units' owners. The accommodation business is the main occupation for the 43.9% of the owners; if the 2 tavern keepers are also taken into account, tourism appears to be the main occupation for the 48.8% of the accommodation owners. Thus for over half of the owners accommodation is a supplementary occupation. A considerable percentage of the owners (31.7%) are not primarily occupied in either farming or tourism; 24.4% of the owners are free-lancers. A similar picture as far as the origin, residence and occupation of accommodation owners are concerned was found in mountainous Korinthia (Grava, 2011).

In Dorida, women account for the 22% of the accommodation owners, a percentage which is slightly lower than that of the women farm-heads in Greece (around 25%). This percentage is quite lower among the permanent in the area inhabitants (17.4%). More specifically, among the 28 married owners 23 are men and 5 are women (i.e. 82:18), a fact that confirms the

gender gap in terms of entrepreneurship. This is so despite the fact that such businesses suit women - as manifested by the women's engagement in these businesses (5 declared tourism as their primary occupation and another 17 as secondary). It can thus be argued that, in Dorida, agritourism, although it opened new (mostly part-time) employment opportunities for women, did not actually fulfil the aim to enhance women's entrepreneurship. As aforementioned, other Greek studies show higher numbers of women-entrepreneurs; however, the fact that women may, following their households' livelihood strategies, be phoney-owners has to be kept in mind (Gidarakou *et al.* 2008).

### An approximation to (agritourism and farming) incomes

Only 10 out of the 41 owners took advantage of the financial support (LEADER, IRSDP) to establish (8) or renovate (2) their accommodation units. None of them was a farmer and only half of them were permanent residents of the area at the time they submitted their applications. Moreover, the obtained financial support was not of outmost importance for 6 of them who claimed that they would establish their business anyway. Similar is the situation in mountainous Korinthia where only 30% had access to financial support (Grava, 2011).

On the basis of the owners' estimations about their income from agriculture and/or their accommodation businesses, it becomes obvious that most of the households involved in agriculture earn less than 15,000 € yearly (Table 4); similar is the situation concerning accommodation businesses.

Table 4 – Self-reported farming, agritourism and household incomes (Dorida)

Income clusters (€)	Farming				Agritourism				Total Household Income (all sources)			
	Total		Permanent residents		Total		Permanent residents		Total		Permanent residents	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
< 5000	2	20	2	20	4	12.9	4	20				
5001 -10000					10	32.2	6	30	1	3.2	1	5
10001-15000	4	40	4	40	9	29	5	25	5	16.1	3	15
15001-20000	3	30	3	30	3	9.7	2	10	5	16.1	4	20
>20000	1	10	1	10	5	16.1	3	15	20	64.5	12	60
Total	10	100	10	100	31	100	20	100	31	100	20	100

Almost half of the accommodation businesses earn less than 10,000 € per year, implying that these households are at-risk of poverty (the threshold being at 8,644 € in 2009); only 8 businesses make more than 15,000 €. As a result, it can be argued that neither agriculture nor accommodation

can, each by itself, provide a satisfactory income to the households; on the other hand, their combination would provide most of the households with noteworthy incomes. However, as already shown such a combination appears to be minimal in the study area. The findings of other studies (Kokkali 2007, Grava 2011) are in line with such findings<sup>7</sup>.

It therefore seems that involvement in accommodation businesses was rather marginal on the part of farmers; thus this type of business has not been, as expected, the catalyst towards the diversification of the farming based households' economy. On the other hand, agritourism has resulted in the development of pluriactivity on the part of some of the household's members (owners, spouses or children) and, in this sense, supported the differentiation of the local economy.

### **Owners' satisfaction and succession prospects**

The low businesses' economic yields are reflected in owners' dissatisfaction; the majority (73.2%) claims that they are not satisfied by either their businesses' revenues or the employment opportunities in the area. With an additional 12.2% holding an ambiguous opinion, it is only 14.6% of the entrepreneurs who are clearly satisfied; yet, 75% among the latter focus on the fact that their tourism activities are new and pleasant to them – only 25% claim satisfied with the incomes obtained. As a result, 83% of the owners believe that under the current circumstances there are no attractive employment incentives for youngsters to stay and contribute to the development of the area. This is indeed reflected in the succession prospects as far as both agriculture and the accommodation businesses are concerned (see below).

Less than 40% declare that they are informed about measures to protect the environment, mainly owing to their own efforts; on the other hand all the entrepreneurs claim that they do their best to protect the environment. Further, 83% claim that they use local products in their business.

According to the data provided by their parents, the majority of the 45 owners' children, aged over 18 years old, are employed in neither farming nor the accommodation business; 38% are free-lancers and employees, 2 are public servants and 1 athlete with a further 22% being higher education students. Only 5 are primarily occupied in agriculture with another 2

<sup>7</sup> In her research addressing 66 accommodation owners in the Lake Plastiras area, Kokkali (2007) found out that only 18.2% of the owners are exclusively based on their accommodation unit to make a living with a further 10.6% claiming that their business contributed more than 50% to the total household income. On the contrary in 40% of the cases it contributed less than 30% to the household income. In her research addressing 74 accommodation units in mountainous Korinthia, Grava (2011), using a full account approach, found out that only in 14% of the cases the accommodation unit is the only household's income source; on the other hand, in most cases (57%) it contributes less than 40% to the household income.

assisting their parents when in need (Table 5); 6 of them are farmers' children. The succession prospects are positive for only 4 of them, all of them farmers' and permanent in the area inhabitants' children.

The succession prospects concerning the accommodation businesses are better. Although only 2 of the children appear to be fully occupied in their parents' businesses, with another 3 working in their parents' taverns, the number of children more or less involved with their parents' businesses is as high as 16 (among which 7 from families not-permanently staying in the study area) (Table 5). A similar picture was obtained in mountainous Korinthia (Grava, 2011) where the accommodation units provide the opportunity for supplementary employment for the household members (70% of the spouses, 74% for the children and 57% for the grandparents).

Table 5 – Succession prospects (farming and agritourism) (Dorida)

	Businesses with children (over 18 yrs.) involved in farming				Succession prospects (farming)			
	Total		Permanent residents		Total		Permanent residents	
	No.	%	No.	%	No.	%	No.	%
Yes	7	22.58	5	26.32	4	23.53	4	30.77
No	24	77.42	14	73.68	7	41.18	6	46.15
Don't know					6	35.29	3	23.08
	31	100.00	19	100.00	17	100.00	13	100.00

	Businesses with children (over 18 yrs.) involved in agritourism				Succession prospects (agritourism)			
	Total		Permanent residents		Total		Permanent residents	
	No.	%	No.	%	No.	%	No.	%
Yes	16	51.61	9	47.37	20	64.52	12	63.16
No	15	48.39	10	52.63	4	12.90	3	15.79
Don't know					7	22.58	4	21.05
	31	100.00	19	100.00	31	100.00	19	100.00

As far as the succession prospects are concerned parents estimate that 20 businesses have positive prospects; 12 among these businesses are owned by permanent in the area inhabitants. Among the 10 owners who accessed financial support (5 of which would establish the business irrespectively of such a support) 7 expect to have a successor and another one is ambiguous. It is rather obvious that under the current circumstances the accommodation businesses, despite their better succession prospects, do not provide employment opportunities to the younger family members - who are expected to come after their parents. Furthermore, the issue of whether these

accommodation businesses will be a part-time job in combination with the current heirs' employment or it will become their main occupation is open. The data also point to the limited relationship between farming and agritourism which, in turn, suggests the continuous abandonment of agriculture - with tourism being a track towards the exodus.

## The Neohori case

### Entrepreneurs' identity

Most of the households got involved in tourism related businesses after the take-off of tourism in the area in late 1990s. The opening of new business opportunities has been their main motive; the small/insufficient incomes gained from agriculture and the wish to stay in their native area have also been crucial driving forces among those staying in the village. Almost all (95%) the interviewees believed that the area has a distinctive identity attributed to its landscape, people's hospitality and local traditions. Very few claimed that the area loses its identity as well as that people were increasingly becoming interested just in profit-making; these were the elder ones, with low education and incomes, and children who did not live in the area.

In Neohori the majority of the household heads (men) were aged. Half of them were over 65 years old (or, 72.2% over 55 years old) with only 17.8% being under 45 (Table 6). Accordingly, their educational attainments were rather low; 40% had, at best, primary schooling (Table 6). Such findings contradict the findings concerning accommodation units' owners as shown by Kokkali (2007), Grava (2011) as well as the Dorida case. Spouses (wives) were younger (58.8% over 55 years old) and rather less educated (41.2% with, at best, primary education) (Table 6).

Table 6 – Entrepreneurs' and spouses' age and education (Neohori)

Age cluster	Head N= 18 Spouse N=17		Education	Head N= 18 Spouse N=17	
	(%)	(%)		(%)	(%)
<30		5.9	Illiterate	5.6	5.9
30-44	16.7	11.8	Primary	33.3	35.3
45-54	11.1	23.5	Lower Sec.	27.8	29.4
55-64	22.2	41.2	Higher Sec.	16.7	23.5
>64	50.0	17.6	Higher	16.7	5.9

Among the heads, 50% originated from the village and had always lived and worked in the area. A further 16.7% settled in the village due to occupational-economic reasons with the rest (33%) originating from the area but having worked away and returned to the area also due to the business opportunities opened due to the explosion of tourism in the lake area.



As shown in Table 7, employment in agriculture was restricted; only one out of four declared that his main occupation was farming (including aquaculture). Six out of ten were primarily occupied in agritourism related businesses and one out of ten was a free-lancer. On the other hand, among those who held a second job as well farming was dominant. Given that half of the entrepreneurs had been permanent residents of the area (i.e. before the establishment of their businesses) where small-scale, extensive agriculture predominated, it seems that most gave up agriculture as their primary job<sup>8</sup> in favour of their tourism related businesses. Additionally, the development of tourism opened windows of opportunity and attracted newcomers in the area (see: Koutsouris, 2008). Such opportunities, for both locals and newcomers, concerned a variety of tourism related jobs besides accommodation, especially taverns and restaurants - the second most preferred tourism related business in the Greek rural areas.

As far as spouses' main employment is concerned, four out of ten were housewives with another four out of ten being employed in tourism related businesses; the rest were free-lancers and none was predominantly engaged in farming. Women were reported to be in charge of the tourism related business in 7 out of the 18 cases (or out of the 17 cases if only married owners are taken into account). Furthermore, half of the wives who declared engaged with a second job too (or 47% of all wives) were occupied in agriculture.

Table 7 – Heads and spouses' main and secondary occupation (Neohori)

Employment	Primary job		Secondary job	
	Head N=18 (%)	Spouse N=17 (%)	Head N=14 (%)	Spouse N=15 (%)
Farming	22.2	-	64.3	53.3
Tavern-restaurant	33.3	17.6	14.3	33.3
Ho(s)tel	11.1	11.8	14.3	
Handicraft	5.6	-		
Souvenirs	11.1	11.8		
Aquaculture	5.6	-		6.7
Free-lancer	11.1	17.6	7.1	
House keeping	-	41.2		6.7

### **An approximation to (tourism and farming) incomes**

Almost two-thirds of the interviewees had benefitted from the financial support provided by various programmes (LEADER, national devel-

<sup>8</sup> The main produces (wine and legumes) were thus used for self-consumption or in their newly established tourism businesses.

opment law). According to the heads' estimations (Table 8) income from farming was extremely low for the majority of those involved in agriculture and thus cannot support the households; 85.7% made less than 5,000 €/year; no case exceeding the 10,000 € was reported. It is worth noting that the data obtained in Neohori are more discouraging as compared to the Dorida case. Therefore, families in Neohori made a living based either partially or, at least as far as one out of three households is concerned, totally on tourism. Nevertheless, the incomes obtained from tourism related businesses were also rather restricted. Only 5% of the heads declared his income from tourism surpassing the 20,000 €, a picture similar to the Dorida case.

*Table 8 – Self-reported farming, agritourism and household incomes (Neohori)*

Income (Euro)	Income from agriculture	Income from tourism	Overall family income
< 5000	85.7	11.1	
5001 – 10000	14.2	22.2	5.6
10001-15000		33.3	27.8
15001 – 20000		27.8	11.1
> 20000		5.6	55.6

### **Owners' satisfaction and succession prospects**

Almost 90% of the interviewees claimed satisfied with tourism development in the area given the profitability of their businesses, the fact that they enjoy such a kind of employment (*vis-à-vis* agriculture) as well as the creation of a new 'social climate' in the area. Around 80% of the heads believed that tourism was beneficial to the area since it presented the locals with new opportunities. The ones who disagreed, claiming that tourism resulted in pollution as well as in the area becoming expensive – even for its inhabitants, were mainly born in the area, with rather high incomes and seemed to be more concerned for the area's future. Most of the interviewed heads declared that they would continue to operate their businesses without making changes; 4 of them were thinking to go on with the building of a hostel and one to get involved in agriculture – for self-consumption.

Moreover, the heads claimed that they were using local products (especially agricultural produces) in their businesses; first they looked for products from their own village and then from the area or the Prefecture. Finally, as far as the protection of the environment is concerned two-thirds of them claimed that they knew the relevant restrictions due to the fact that the area is a NATURA 2000 site; in parallel, given the importance of the landscape and the environment for local (tourism) development, they, more or less, claimed that they took care of the physical environment and

were aware of relevant measures. However, when research went in more depth, especially as far as good agricultural practices and their implementation are concerned, they were not found knowledgeable.

Although few of the local farmers got involved in agritourism, at least as far as accommodation is concerned, the newcomers (not originating from the area) who established such businesses in the area supported the differentiation of the local economy and multifunctionality.

As far as their (27) children are concerned, the majority (81.5%) fell into the 30-44 age bracket (comprising the eldest cohort); overall, children's educational attainments were better than those of their parents (only 2 out of the 27 with primary education vs. around 40% of their parents with, at most, primary education). As in the Dorida case, the majority of the children (all being over 18 years old) were not occupied in farming or tourism. Less than one out of four (i.e. 6 children) were occupied in tourism (4 among the eldest and 2 among the younger ones) and less than one fifth among the eldest ones (and, none of the younger ones) were occupied in farming (i.e. 1 in farming and 2 in fish-farming). Almost two thirds were free-lancers or technicians (Table 9) spending, according to their fathers, at least 90% of their working time in their main job.

Only six (out of 27) children were pluriactive. Two among the eldest ones in farming and a younger one in fish-farming, with the rest (3 among the younger children) assisting their parents (during the week-ends) in family operated taverns-restaurants (Table 9). In general, agritourism related businesses seemed to have better prospects as compared to farming given that one third of the children were occupied in (mostly family owned) hostels and taverns (22% as main and 11% as supplementary occupation). It should be noted however that the development of agritourism had not been able either to attract or to provide employment opportunities to the businesses owners' children even in such a well-established tourism destination.

Table 9 – Children's main and secondary occupation (Neohori)

Employment	Primary job		Secondary job	
	1 <sup>st</sup> Child N=17 (%)	2 <sup>nd</sup> Child N= 10 (%)	1 <sup>st</sup> Child N=2 (%)	2 <sup>nd</sup> Child N= 4 (%)
Farming	5.9	-	100	
Tavern-restaurant	17.6	10		75
Ho(s)tel	5.9	10		
Handicraft	-	-		
Souvenirs	--	-		
Aquaculture	11.8	-		25
Free-lancer	58.8	80		
House keeping	-	-		

Children, according to their fathers, although having assisted substantially in the establishment of the family's tourism-related businesses, were not interested in working in either tourism or agriculture. Nevertheless, parents aspired that, in case such businesses were to prove profitable, children would inherit/undertake them later on. The current high unemployment rates, owing to the country's economic crisis, may (*ex ante*) support such an expectation and, in general terms, the return of young people to their native communities in the Greek countryside.

## Discussion and conclusion

In this piece of work an effort to explore issues which have been marginally dealt thus far with, such as the profile of those involved in agritourism, especially the degree to which farmers pursue diversification and multifunctionality, the incomes obtained from agritourism and farming and the succession prospects of both activities, was undertaken. To fulfil such an aim (part of the) data from research in two different, in terms of agritourism development, Greek areas were utilized: first, the Dorida municipality, a not-well known destination; second, the Neohori village at Lake Plastiras, a nowadays well-established tourism destination where the local authorities and development agencies have been extremely active in promoting a wide variety of projects relating to agritourism, local culture and the environment.

The results of the two case studies point to the fact that the majority of those involved in agritourism, especially accommodation, are not farmers. The entrepreneur's demographic data show that they are younger and better educated as compared to the farming population. This is clear in the Dorida case as well as in other Greek case studies addressing accommodation entrepreneurs but it is not verified in Neohori, possibly owing to the (earlier) timing of the establishment of the agritourism related businesses in the area.

Furthermore, although quite a number of agritourism entrepreneurs own agricultural lands, involvement in farming concerns, mainly as a secondary job, those who live permanently in the research areas and much less the rest of their households' members, especially their children. In this respect, the fact that farms are small (i.e. smaller than the national average of 4.6 ha.) and income from agriculture is, in most cases, lower or around the at-risk of poverty line has to be underlined.

It has also to be stressed that around half of the agritourism entrepreneurs had been permanent residents of the research areas. In Neohori, the majority among the rest of the entrepreneurs originates from the area and returned in order to establish their business. Additionally, especially in Dorida, quite a number of the entrepreneurs do not stay permanently in the area but commute in order to take care of their business. In some cases in-

dividuals with no prior relationship with the research areas took advantage of the opportunities offered by tourism development in order to establish their agritourism related businesses. The degree to which entrepreneurs took advantage of the available financial support (LEADER and IRSDP) is differentiated between the two research areas given the active contribution of development agencies and local authorities in agritourism development in the Lake Plastiras (Neohori) case which is missing in Dorida.

It has to be mentioned here that all agritourism businesses are based on Greeks visiting the areas mainly during the week-ends and major religious festivities-vacations (Easter, Christmas, Ash Monday, etc.); on the contrary, summertime vacations in Greece are still related to seaside tourism. Under such circumstances the employment opportunities for the households' members are limited. At the same time, our findings suggest that in quite many cases agritourism per se does not provide satisfactory incomes. Thus, quite some among the agritourism entrepreneurs and the majority of their children are primarily not occupied in tourism. Nevertheless, many children give a hand in their parents' agritourism businesses and indeed much more than in the case of farming. Succession prospects are also better in agritourism as compared to agriculture. Agritourism development thus gradually downgrades farming to a secondary job or drives to its abandonment.

With respect to gender, despite the fact the agritourism related programmes, in the framework of gender equality mainstreaming, offer additional incentives to women, the majority of entrepreneurs are in both cases men. This is true especially in Dorida while in Neohori the picture, given the diversification of the agritourism related small-scale businesses, is more balanced. As aforementioned, other case studies in Greece present a better picture of women's agritourism entrepreneurship in relation to Dorida; in parallel, though, it has to be stressed again that these results should not be taken at face value. Notwithstanding such considerations, it is obvious that agritourism has, at least, provided women with employment opportunities; on the other hand, women are much less involved in farming, mainly as helpers.

As far as succession in agriculture is concerned it is most likely that very few of the entrepreneurs' children (mainly children of full time farmers) will continue farming. The espoused target of agritourism, i.e. the broadening of the production basis of farming households and the improvement of farm structures, seems to have been minimally fulfilled; as aforementioned multiple reasons (age, risk-aversion behaviour towards innovations, lack of financial capital, etc.) disincline farmers from getting involved in agritourism. Moreover, the better succession prospects of agritourism businesses indicate that agritourism development functions as a path towards the abandonment of agriculture. Such a trajectory has been pointed out in international research/literature as well; although diversification through tourism is often espoused as a means for the alleviation of the problems

agriculture is faced with, this is not always the case (OECD, 1994).

Overall, the findings of the two Greek case studies suggest that agritourism has not been an attractive option for farmers; thus a strong relationship between the two activities has not been established. Agritourism has been an opportunity for rather younger and better educated individuals, as compared to the average farming population, to establish new businesses in the research areas. Quite many among them originated from or were new-entrants but still not permanent residents in the areas. Agritourism supported, in both the cases examined here, the diversification of the local economy and the utilization of the primary production; additionally, through 'farming the land', pluriactive farms contribute to the maintenance of rural nature and landscape. At the same time, agriculture is endangered with abandonment on the part of the next generation; and while tourism seems to have better succession prospects, these are not secured either. However, nowadays, the rapidly increasing rates of unemployment along with falling wages may augment the prospects that urbanites will return to the countryside and engage in multifunctional agriculture.

With reference to the typology of Van der Ploeg and Renting (2004), the main shift on the part of the farming households in the study areas is manifested through the redistribution of the household's labour force between on and off-farm activities. It thus concerns 'regrounding' (re: pluriactivity), rather than 'broadening' or 'deepening'. Or, according to Ilbery (1991) it concerns structural rather than agricultural diversification.

Such findings are in line with research stressing phenomena concerning "the expropriation of agriculture as a means of creating 'room' for the consumption of the countryside" (Van der Ploeg & Renting, 2004: 234) or that tourism "has become the lynch pin of many rural communities, having effectively replaced agriculture in this role" (Garrod et al. 2006: 118). On the other hand, the vulnerability of rural tourism development, i.e. the fact that concentration on tourism "runs the danger of producing too great a reliance on specific and limited economic sectors" (Lee et al. 2005: 275) thus opening the areas to greater exploitation and loss of autonomy with aversive results under conditions of economic crisis, like the current situation in Greece<sup>9</sup>, has to be stressed as well.

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<sup>9</sup> As revealed by recent research data from the Lake Plastiras area (re: Kokkali, 2011; ongoing PhD research on rural tourism in the Dept of Agricultural Economics & Rural Development, Agricultural University of Athens).

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**PART THREE**

**INNOVATION IN RURAL TOURISM  
AND LOCAL DEVELOPMENT**



# Tourism and Agriculture Revival - Flagship initiatives in a fragile region<sup>2</sup>

## Introduction

The changes that have occurred in rural areas in the majority of European regions in recent decades and widely noted by researchers (Baptista, 2010; Figueiredo, 2011), are marked by elements that cut across the different social economic contexts such as: the progressive dissociation between the life in rural centers and the urban supply, due to a technological transformation in agriculture and in the distribution systems; the expansion of environmental damage and the concern with its control, and the growing attraction of the rural space for the urban population either to live there or to conduct leisure and tourism activities there. All of these aspects manifest themselves specifically in low density areas, as in the case of the Alentejo region in Portugal, which is the focus of our reflection, namely regarding the attraction exerted by the idea of 'rurality' for the urban population.

The current chapter aims to provide a better insight into the innovative touristic initiatives starting in some major traditional farming units in this southern region of Portugal, oriented towards the production and marketing of certified brands of wines, olive oil and other native products. The majority of these units observe organic farming. In such settings, the tourist supply oriented to new demanding market niches with high purchasing power, enhances the visibility of the farming products in urban environments, meeting at the same time the growing demand for tourist experiences in rural environments by urban populations. Each company puts out

<sup>1</sup> Corresponding author, patrego@uevora.pt

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its own publicity, in magazines on the subject, in the web and through social networks. These media enhance the opportunity for the target group to benefit from touristic experiences in idyllic rural settings, or those introduced as such. These proposals for breaking with the urban routine are said to revamp body and soul.

This exploratory study is part of a large research project on real utopias in socially creative spaces. We start with a short discussion on the settings of the emergence of new rural tourism initiatives. Afterwards, some potentially creative aspects are discussed: the construction of tourist resources with a cultural basis; the construction of tourist experiences; and the communication strategies presented by the tourism projects. In the face of the study goals, the first empirical results are presented, based on the content analysis of the promotion conducted by a number of rural tourism units from the Alentejo region.

## **Main theoretical framework and contextualization of the research problem**

### **New touristic initiatives in a rural setting**

The decline of agricultural production in Portuguese rural areas has led to the diversification of rural activities, in the search for new economic value in these areas. One of the solutions found is rural tourism with a range of opportunities which are centred around cultural resources with roots in the local territory.

In the case studies presented and discussed, tourism goes hand in hand with farming in farms in southern Portugal in the region of Alentejo that are an inheritance of the large estates of the past which, up until the 1980s, were used for agriculture. The association between farming and tourism initiatives comes as a strategy for the development of business and in some cases it is a 'lifestyle entrepreneurship' when businesspeople come from urban areas (Cunha *et al.*, 2011).

In this link between production and consumption, enotourism is currently an important emerging trend in Portugal, in particular in Alentejo. This is one of the most promising niches, combining the universe of wine growing with countryside and tourism, where new products may arise, namely rural hotel businesses (Croce & Perri, 2010). This new tourism trend is associated with the usage of viticulture resources of a particular region, in which the interest for wine reflects not only on the knowledge of this product but also on the locality and on the setting of its production (Inácio, 2009). Culture, lifestyles and territory are blended in enotourism. The latter appears as a touristic resource: a 'niche territory' (Cavaco & Simões, 2009), with specific geographic features. In this setting, it is compelling to examine the existing synergies between the farming and the tourism sec-

tors. This is a relevant aspect considering the time and space configuration that may characterize new touristic projects anchored in food production in general, and in wine growing in particular. The feature to be underlined in the configuration of these tourist spaces is its enclave structure (Carroué, 2002; Salgueiro, 1999 and 2002), showing micro-inequalities in space (Velts, 1996). The settlements develop following a point by point spatial pattern and introduce a sudden difference in relation to the environment, apparently showing no continuity between these enterprises and the other local entities. Therefore, it is relevant to discuss how these touristic projects arrive in the wake of the fragmentation of space in rural regions', or on the contrary, how they comply with its diversification and the arrival of new opportunities. The increased mobility and diversity of social groups and the fragmentation of the social structure account for the emergence of 'different space sequences' (Salgueiro, 2002), characterized by different ways of using space but also by different organizational approaches and dynamism of companies established in the rural milieu.

In order to best understand the supply profile, in particular the strategies leading to their success in the market, it is also necessary to grasp the demand expectations. In recent years, the progressive acceptance of a growing variety of countryside tourism, adventure, sporting, culinary and cultural forms come only to show the growing demand recorded in Portugal for more intimate tailored forms of tourism (Barros, 2003). The demand for such tourism comes, however, mainly from urban areas.

If our society is more and more urban, due to residence and jobs and also due to values and dominant behavior, the rural space exerts a growing fascination dating back from childhood or family memories affirming itself further with ideological concerns about preservation of nature inspired by ecological or aesthetic factors. As Cavaco mentions

the countryside is idealized by the quality of the environment and of lifestyles, green and natural spaces – more or less 'wild', calm and natural rhythms, silences, security conditions and tranquility, interpersonal relations and fraternal solidarities (2005: 87).

Actually, nature and landscape play a fundamental role in building these new tourism spaces. Tourists wish to "return to nature", enjoy life in the open air and have a healthy diet. Indeed, rural tourism units offer the urban tourists the possibility to achieve these material and symbolic relations with nature. In these farms, rural and tourist ones, the real and the imaginary appear intertwined. In some cases, one even feels as if one were witnessing an enactment of a remote rural space that never existed.

In the last decade, the growing number of offers of tourist experiences in rural areas reveals, as mentioned above, new opportunities for economic sustainability for these areas. The experiences offered are antithet-



ical to modern urban environments (Sharpley & Jepson, 2011) and are oriented towards tourists seeking a different, transforming though short experience, when scheduling a week's holiday or a healthy weekend, combining staying in farms with cultural visits. These demands require accessibility to major cities as well as the vicinity of rural centers with rich cultural heritage, which are two important factors to bear in mind in this rural tourism.

Tourists seek new attractions in these rural experiences, in the role of the players (consumers and producers) and in the context/scenario of the experience (Mossberg, 2007). The focus is not on the product or service, but rather on the way it is seen, understood and felt. Tourists participate in the making of the experience and promoters supply the environment as well as all the conditions for achieving the experience. Regarding contexts/scenarios of the experiences, they are, as we note above, in contrast with urban routines. They are short lived and exclusive and favourable for contemplation, creativity and action. The exclusivity of the settings of the experiences has to do with the emotional meaning of the sites. According to Pinto-Correia (2005), this aspect is nurtured by romantic literature which gives more attention to the emotional than to rational and to the rural in contrast to the urban which results in the building of tourist landscapes.

The tourist demand that we are talking about is fed by a new rural image seen as a space of wellness offering healthy and authentic experiences. This demand for rural spaces is oriented to body and soul revamping practices as both are of importance in people's lived experiences (Butler, 1999). Fashion underscores experiences favoring personal value and transformation. The growth of health tourism (in both its medical and wellness variants) illustrates the demand for healthy lifestyles. In general terms, health tourism enables the combination of two important leisure components: both the recreational and the well-being dimension. The demand for healthy longevity and the discipline of the body (Gustavo, 2009; Little, 2011; Parr, 2002) through exercise, diet or meditation, practices and routines account for the growing importance of this segment of the tourist market. In most of these cases, the health and wellness activities are associated with gastronomy based on organic products (which are also highly valued in terms of health) as well as on local products and recipes (providing the experience with a more unique character).

In the farming-tourism units studied, tourists do find a set of hybrid spaces and products converging in the above-mentioned objectives. Gustavo, speaking about the new health tourism market, notes that it

appeals to unique crossings and encounters, sometimes paradoxical, such as the natural with the technological, science with the profane, West with East and rural with urban (2009: 196).

The transformations that have occurred in recent decades in Portuguese rural areas involve the rebuilding of the rural space's identity. As Baptista (2011) argues, the rural is no longer farming, but neither is it strongly associated with anything else yet. This remark raises the pertinent problems of the economic development in rural spaces and of the relationship between rural and urban spaces. The point here, in the framework of our study, is to know what the contribution is of new rural-tourism initiatives for social development, wealth creation and the definition of cultural resources in these rural territories in change. No less important is to understand how to guarantee the participation of rural populations, the negotiation and the cooperation between the various agents of the local communities. In the end, the way in which interactions of these communities with the exterior are secured, guarantees their participation in the development of rural areas.

In some ways, globalization has interwoven local with global (Ciattoni, 2005). Currently, although the local reality and proximity are valued in the success of the activities developed in the rural world (such as the ones coming out of the association between agriculture and tourism) globalization generates territorial discontinuities at the local level. According to Veltz (1996) the solution can be found in a new vision for the local territory.

In an economy of speed and uncertainty, the territorial anchorages, the strength of cooperation's rooted in a history and fed by projects, is the privileged means to safeguard the slow mechanisms of competition: building of skills, networks and relations (1996: 261).

Accordingly, the promising development process must be anchored in local reality, integrating the social memories and their natural settings. Following, in the same perspective, the proposal of Ferrão (2012), and applying it to the rural space, we can say that it will have a sense of a future if the rural conciliates its "spaces of places" which are characterized by experiences, landscapes and particular identities, with the "global spaces of fluxes", marked by mobility, innovation and decision.

Robinson and Tormey (2009) refer to the creative possibilities of the new social-spatial relations emerging from movements and flows of change. In accordance with this view, we can see the conditions created by the new tourism initiatives as a driving force for the renewal and stimulation of the rural world. We may still consider that this dynamic occurs as an outcome of the occasional symbiosis between the customers of authentic rural experiences (for e.g., grape harvests, bread baking or cheese making, pottery or traditional footwear making) and the local population possessing the traditional know-how. This partnership between tourism (materialized by experience) and the local agents allows the anchorage of a tourism project in the rural environment and contributes to conciliating some distinct in-

terests, necessities, representations and desires of the different players involved in this process. Moreover, it constitutes a topic for discussion about the role of tourism in rural development.

Thus, we see new possibilities for the future of the rural space. Rural is no longer just farming, but rather a reality driven by permanent flows stemming from the outside and echoing in the rural world.

Inscribing rural space in the ensemble of “spatiality’s oriented to the future”, as suggested by Ferrão, is a challenge requiring a deep knowledge of this environment as well as the identification of the players participating in the decision process and in the regulation of the territory. The local public authorities, due to their responsibilities in defending the interests of the rural populations, in the governance process, play a central role in economic dynamic: by facilitating the emergence of projects, defining credible future scenarios and contributing towards the convergence of those views among the different players. In short, cultural territorial development of the rural space may benefit from cooperation rooted in local history.

### **Creativity and innovation in rural tourism**

Admitting that creativity may be seen as the ability to associate what seems disconnected (William Plomer, 1903-1973, South African writer) and that innovation corresponds to new products and services, tangible or intangible, resulting from that association, the relationship that is established between rural life practices and representations on the one hand and new tourist niches, on the other, appears to illustrate very well a creative and innovative dynamic. In this context we would like to present some available resources and competencies that are certainly contributing to that.

### **The construction of touristic resources**

Since landscape, nature, built heritage, culture, rural traditions, agricultural production and events of tourist relevance are central ingredients to building recent tourist spaces, we seek to understand, on the one hand, the way in which new agro-tourism units emerge in rural spaces where they exist and, on the other hand, how they integrate the elements referred to above in an – eventually new – tourist market. The ability in the first instance to identify, and then in the second instance to transform, the accessible/available elements of the natural and cultural environment into resources – by way of the creation of value – is a process that mobilises knowledge and which in this way contributes to local innovation (Jeannerat & Crevoisier, 2011). According to Crevoisier,

knowledge can be seen as essentially mobile and regions will prosper to the extent that they can anchor it and develop it further locally (2010: 2).

The farms of Alentejo, the object of our analysis, boast a remarkable surrounding of landscapes that are original or transformed by tourist units. The latter frequently build ornamental ponds, gardens, waterfalls etc. Even when these landscape transformations occur, the identifying brand name of the rural heritage and of the cultural context of the region or place is preserved by tourist units. The supply proposed in the studied farms show that several endogenous resources are fundamental for their tourism market allowing a large variety of rural experiences. In this framework, farming tourism businesses give vineyards and olive orchards a centrality associating the economic and esthetic dimensions (e.g. through creating vine gardens). Rural life is valued through farming and handicrafts activities for tourists (e.g. grape harvesting, baking bread or making cheese.) and in the presence of farm animals. The surrounding heritage is not forgotten and creates authenticity: it is widely broadcast in the tourism-based firms' websites and display activities and experiences for the clients.

Regarding the challenges that these tourist experiences pose for local communities, Kastenholz and Lima take a stand and claim that

the community's identity must be understood as one of these area's most important resources, for the development of the territory as much as for the development of significant and distinct tourism experiences that respond to the search for authenticity, the genuine and traditional (2011: 63).

If we adopt this viewpoint, the whole experience connected to the rural world, when mediated by the ancestral knowledge of the supervisor, the shepherd, the baker, the winemaker or the pot maker is more appealing and distinctive. Beyond the product itself (or the service), the know-how of cultural heritage is a factor that would represent an important role in the local community, if perceived by the population as a tourism resource.

It should be noted that the small size of the agro-tourism units in terms of accommodation minimises the dangers associated with mass seasonal tourism for the cultural heritage of local communities. The mobilisation of cultural resources cannot break the intrinsic dynamic of local communities.

Finally, if we accept that resources are construct in the relationship that is established between the interests (and visions of the future) of agro-tourism units (and their entrepreneurs), and the expectations of their customers, these resources are not established once and for all, they evolve over time and are constantly being adjusted. In this context, Kebir and Crevoisier (2008) underline the central role of innovation which determines what constitutes a resource and what no longer does.

### The building up of the tourist experience

How to build a tourist experience? What are the creative and innovative dimensions of the “experience economy” that we want to keep?

In the last decade, in rural Portugal, tourist experiences proposed by specialized companies such as “*a vida é bela*” (*life is beautiful*) are ever more frequent. These are packages selling “extreme emotions”, “zen moments of relaxation”, “spa & beauty”, “exotic sessions”, “romantic dinners”, etc.

Also currently, rural tourism as it is offered in estates, manor houses and country houses as above-mentioned are an experience per se. Moreover, the supply transforms the short stays of guests (a weekend or a week) into living experiences: an idealized “rurality”<sup>3</sup> resulting from the hybridization between real countryside and its symbolic representation; a relationship between tourist and rural spaces, both at physical and spiritual/emotional levels; an emotional product or service based on the creation of authenticity, be it food, houses, working practices, etc.; the defense of values and of ecological practices.

These dimensions, present in the experiences supplied in the rural space, are some of the most creative aspects of the “experience economy”<sup>4</sup>: the intimate relationship between entrepreneurs and tourists treated as guests; the convergence of a prestigious farming production and tourist activity; the intangibility of the proposed product since the experience can only occur physically in the proposed context (Desforges, 1999); the fact that processes gain weight over the products; joining real with symbolic in the experience (hybridization); the authenticity conferred to the experience through the participation of local agents in its building; using territorial marketing (specialized magazines, websites and social networks) in promoting initiatives.

In the perspective of what was discussed above regarding the new economic opportunities anchored in rural spaces, it is important to note that the consumption of experiences creates, according to Jeannerat and Crevoisier, a

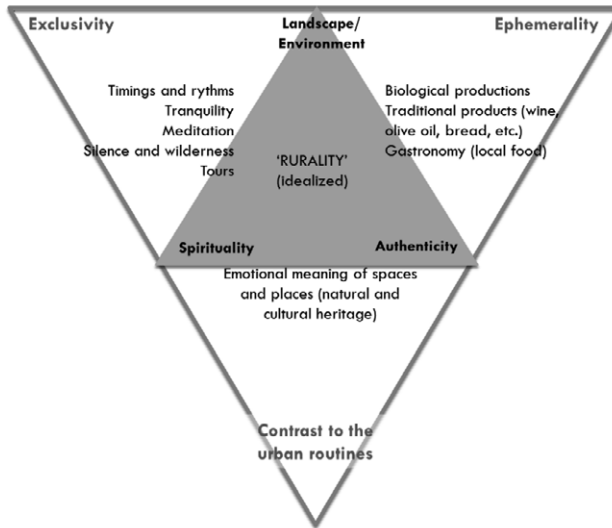
high level of added value to a classical good or service by incorporating various types of experience related with the consumer’s participation or emotions (branding, events, coaching, etc.) (2011: 30).

<sup>3</sup> As Figueiredo and Raschi (2012: 21) observe, «In modern societies, rurality, together with *authenticity* and *reality*, are largely social constructions. Consequently, the reconfiguration of rural areas takes place more in minds of urban dwellers, than in the habits, representations and everyday life of the local population».

<sup>4</sup> According to Pine and Gilmore (1999), the consumer’s experience is a new economic form where goods and services are not economically valued for themselves; they are supports to the consumer’s memorable engagement (the end-consumer is central in the value creation of experience); what is sold is consumers’ experience through admission fees. Crevoisier (2012) underlines that, the consumer’s experience is considered as a specific quality convention between a stager and a guest.

Based on topics previously presented, we have drafted an analytical model of factors influencing the rural tourist experience (Rêgo & André, 2012). The model, shown on figure1, has its central concept in the idealized “rurality”.

Figure 1 – Factors influencing tourism experience



In the inner triangle of the figure, the anchors supporting the tourist experience are identified: landscape/environment, authenticity and spirituality. In-between each pair of anchors are the specific resources of the tourist experience, in reality what is offered to the tourist (e.g. between landscape/environment and authenticity, appear traditional products, organic products and local food). Finally, the outer triangle defines the principal components of the experience: the contrast with urban routines, the ephemerality of the experimental episode and its exclusiveness.

### Communication strategies

How do the media create and disseminate a specific representation of a place? This question is raised on the one hand, because the media are the means used by all of us to find interesting offers, places and populations – in particular places that we personally do not know – and on the other hand because territorial marketing has a growing importance in the promotion of tourist spaces. Besides the traditional media, such as magazines or television, tourist units resort to broadcasting through websites which permit them to control the image that is delivered to final consumer. In the

websites of agro-tourism units the evoking of emotions is privileged along with practical information. The following headings are features together with information: concept; experiences; activities; image galleries; news; contacts and reservations.

As Pinto-Correia argues (2005), the transformation of a real landscape into an ideal one, as described in a supporting promotion, influences attitudes in relation to that landscape and contributes to the formation of the tourist landscape (more emotional), valued and sought for by visitors. The dissemination processes distinguish some areas and contribute to the recognition of them as having a strong landscape identity (in their natural and cultural characteristics).

No less important, the knowledge of communication and marketing techniques is important for the success of agro-tourism units, enabling them demonstrate, in the global market, the quality, certification and distinctions accorded to the products, services or brands of the companies. In this context, Jeannerat and Crevoisier (2011) call attention to the importance assumed by the processes of diffusion and legitimation in the economic exploitation of authenticity.

The promotional resources of most small promoters are still centered on the most conventional forms of Information and Communication Technologies (ICT) and are based on the sharing of data and information. In the meantime, among the large tourist promoters such as booking.com, the new web 2.0 platform is generalized, which takes into account the social and human aspects of knowledge. This means that user's participation brings value to broadcast knowledge. In the tourism industry, accession to social media enables interactive contacts with the demand side, changing

the way travelers and tourists search, find, read and trust, as well as collaboratively produce information about tourism suppliers and tourism destinations (Sigala *et al*, 2012: 1).

The web 2.0 applications are of a variety of types and offer different degrees of use enabling the users to participate in the production of services. The active participation of clients is designated as the most significant benefit of web 2.0 usage in tourist marketing (Conrady, 2007; Sigala *et al*, 2012).

The fact that some small companies studied use some web 2.0 marketing tools, such as their own Facebook page, shows that this new platform is not only confined to large operators. According to Christou (2012) the web 2.0 marketing tools have been used in the development of competitive advantages for small and medium-size companies in relation to larger ones. In our study, the tourist promotion analysis reveals the occurrence of selection and sharing of common interest information in the social networks or even on-line resource evaluation (e.g. sharing interests, activities, and experiences on Facebook).

## Empirical analysis: methodology and results

The analytical focus of this paper deals with creative strategies that support new tourism experiences in the rural south of Portugal. We also want to discuss how the resultant innovations meet the pre-existent rural reality, that is, what are the leverage and the barriers to the diffusion of these initiatives and how they contribute to local development.

In methodological terms, this research was supported by case studies including analysis of documents as well as interviews with local agents and privileged observers, namely those who regulate tourism, land planning and rural development. In a few situations we used participant observation.

The current results, however, come from the analysis of promotional materials developed by a set of 12 recent rural-tourism units located in the region of Alentejo. Resorting to the marketing on the internet and in specialized magazines, a content analysis was conducted based on the following labels: target; regional context; nearby places; accommodation (public spaces, rooms and facilities); activities; experiences; gastronomy and winery/enology.

Given the purposes outlined for this paper, we have focused our content analysis on the search for the questions which emerge from the theoretical framework:

### How do the new agro-tourism units emerge?

The tourism units that are analysed are subject to two processes of emergence: on one hand, that which results from the lifestyle choices of entrepreneurs, and, on the other hand, that which results from market strategies of businesses related with the agricultural sector or the tourist sector. The first are illustrated by the following situation: A. and P., when they discover the charms of Alentejo, here “find the spirit of peace and the recharging of batteries for their intense professional activities”, and the same time as they put into practice, in the tourism unit that they build, ‘dreams of environmental protection’. The latter refer to business initiatives which mobilise technical knowledge relevant to the areas of agriculture and tourism, in the search for innovative concepts and success. The project, which proposes to

reconcile the attributes and service of a resort with the vineyard landscape and wine culture, allowing guests to experience all of the winemaking process, from the selection of grapes to bottling

illustrates the last situation. In these cases the conception, implementation and expansions of the projects results from the establishment of partnerships with specialists outside of the local context of the agro-tourism business.



### **What is the importance of the regional and local context?**

Given that the process which defines the tourist resource has its origins, as we discussed earlier, in the existing territorial matrix (for example the presence of a river) or that which was constructed in the past (for example the presence of a castle), the context (local and regional) where tourism units appear is relevant and is identified in their promotion: reference is made to nearby places whether they are urban centres (with some heritage interest and some complementary cultural and entertainment activities) and to other historical sites, whether to beaches, dams, rivers, natural parks, all of them favourable to the development of tourist circuits and the diversification of cultural and outdoor activities.

### **How are the ‘resources’ of the surrounding rural context integrated and transformed? Which other resources and skills are mobilised from the outside?**

On one hand, the relation of tourist units to the territory is characterised by anchoring what is obvious in what we have just referred to. On the other hand it is this characteristic which will permit tourism units to construct their tourist resources. “The link (the resource) is created when an intention to produce is projected into the object in question (with this, I can produce that)” (Kebir & Crevoisier, 2008: 1193). Attending to these aspects, the content analysis of tourism promotion permits us to identify two levels in the mobilisation of skills around the elements that are deployed in the context of tourism units: the first is related to the integration of these elements (cultural, environmental, heritage) in tourist circuits which can be developed in an autonomous way by the customers or with the personal assistance of a specialist, which increases the value of the resource; the second is concretely related to the construction of tourist resources. In this way the

nighttime landscape of Alentejo – one of the European regions with the least light pollution is valorised through the suites which allow the opening of the roof

vines allow one to “draw the landscape” and “vine gardens” emerge; the presence of a resident enologist allows the development the oenological culture of visitors, guests and residents (with tests and courses); the creation of a wine club

ensures that its members can, each year, make their own personalised wines and follow the winemaking process from the vineyard to bottling; the environment motivates environmental sustainability practices, materialised in

the search for levels of environmental excellence and energy efficiency in the conception, construction and management of the business

the food products coming out of the tourism unit, “fruit of the purity of Alentejo soils, of local traditions, of dedication and effort of those that care for them”, produce own brands; the geographic-natural characteristics of the property permit the construction of an “organic lake”; the restoration of mud-walled homesteads allow the transformation of mangers into tea rooms, and chicken houses into exterior terraces. In this way we can see that this process of transformation/creation of tourism resources incorporates different levels of knowledge and implies, above all, the definition of a vision for the tourism project. Some entrepreneurs even mobilise, according to their vision, resources and skills from the outside. It is the case of meditation retreats or yoga lessons which require specialists who are contracted for that purpose. We also find contexts which are especially suitable to be transformed into cinema sets or photography sessions. The possibilities for the transformation of rural contexts thus open the way for innovation.

### **What experiences are offered?**

Since a large part of the activities regard experiences, we will analyse the proposed experiences, labelled as narratives (a story, an arena, a process or a structure). In this case, the result of the content analysis is expressed through “clouds” of words (semantic units) in which the dimension corresponds to the frequency they appear in the texts.

The promotion of tourist products is based on whatever appeals to customers: the stories and the experiences hidden behind the products. A story or a theme gives the lead to the memorable participation of the customer in the experience. According to the “cloud” portrayed in, the latter reveals heterogeneous characteristics (for body and soul...). The products proposed are of hybrid nature and comprise apprenticeship process (e.g. Spa, yoga, cooking, cycling riding, winemaking, fishing, hiking, painting, drawing, surf, jazz, pool...). The proposed experiences offer those of the body (resting, relaxing, winetherapy...), and others involving the discovery of the surroundings of the tourist units (e.g. picnics, sunsets, landscapes, ballooning...).

We can see in this words-cloud the anchors which support the experience: the landscape/environment, the values of authenticity and spirituality. So, in these truly brand new tourist spaces, enjoyment (passive and/or active) of rural landscapes is proposed and wellness practices favouring the discovery of an individual identity are suggested. These are, however products based upon an idealized ‘rurality’, that is a rural life seeking to combine the best of the urban world with the best of the rural world (tranquillity, landscape aesthetics, health, etc.)





Reading this words-cloud allows the identification of the important characteristics in the promotion of agro-tourism units: a refuge, offering peace and tranquillity; an welcoming and exquisite atmosphere; the enhancement of the rural landscape and of an healthy physical activity; the proximity to historic sites; the opportunity to discover the local food; unique and enriching experiences including training activities; the special attention given to vineyards and wine making as well as to environmental and energetic concerns of the projects.

In short, the customers of these tourist units, now treated as guests, may have contact with idealized rural places, have intangible place-based experiences and make a dreamed and healthy break in protected and exclusive milieus.

## Conclusions

This exploratory research shows that these innovative touristic initiatives establish different connections/bridges between: the (idealized) rural space and the urban space; agriculture and tourism, anchored in the construction of natural and cultural resources; production and consumption; customers and local community of producers by an apprenticeship process. However, do the two sides of these bridges obtain equivalent benefits?

On the one hand, the successful rural culture (idealized one?) comes to the cities through marketing strategies. On the other hand, the contribution of the presence of these rural units to rural development could be important because new tourist activities end up promoting the relationship between isolated communities and the outside world that arrives here through tourism.

Firstly, the way in which tourism projects are anchored in the rural environment could contribute to conciliate some distinct interests, necessities, representations and desires of the different players involved in this process and constitute a topic for the discussion of the role of tourism in rural development.

Secondly, the recent profusion of promotional materials for new agro-tourism projects have the effect of putting forgotten places back on the map. In this case, the visibility gained could be decisive for attracting investments and new residents. As Smith (1999) puts it, we must not forget that marginal spaces may become places of creativity and initiative, allowing the building up of open and flexible identities, since differences tend to be tolerated.

Thirdly, we observed that, the central role given to marginal rural spaces by flagship initiatives anchored in tourism could be important both for the entrepreneurs and for the local communities, whether from the point of view of attracting tourists, or from the point of view of the creation of a market for tourism products and services.

However, the exploratory analysis of tourism promotion already carried out reveals that these projects are focussed on a very specific customer segment which is informed and particularly sensitive to the ephemeral patterns of fashion dictated by large urban centres. Parallel to this, however, these units demonstrate the capacity to construct innovative economic resources, taking their lead from the existing territorial matrix, the processes of construction of tourism resources mobilise above all knowledge and skills exterior to local communities.

In this way, flagship tourism initiatives compel to a reflection on complexity, ambiguity and the multiple functions of the identity of the players acting in the rural space, thus contributing to questioning the identity of the rural.

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M. Rønningen<sup>1</sup>

# Rudiments of an innovation system in the rural tourism industry – how systemic features promote innovation

## Introduction: background, context and the research problem

Over the past few decades, rural areas in many countries have faced the pressures of economic transition. As a rule, many traditionally strong primary industries, such as fishing, agriculture and forestry, have declined dramatically, and many areas adversely affected by these structural changes have viewed tourism and related industries as replacements for traditional rural livelihoods (Hall *et al.* 2009; Hall *et al.* 2003; Sharpley, 2005; Saarinen, 2007). Many Norwegians regard tourism as a possible instrument for increasing both employment in rural areas and female employment in general (NHD, 2007). To meet this challenge, the rural tourism industry has to grow and become more competitive. According to Hjalager (2002), innovative capacity is a prerequisite for growth in the tourism industry. Hence, it is worthwhile to draw attention to innovation in the tourism industry in general and the rural tourism industry in particular. Innovation in rural tourism enterprises is thus the subject central to this study.

The general subject of this paper centres on factors or forces that increase the innovative ability of rural tourism firms. Past studies have demonstrated that rural tourism enterprises in Norway are generally quite innovative, even if innovative capacity varies significantly across firms (Rønningen, 2010a). External relations, networks, co-operation and systemic features in general have received much attention in the research literature on innovation. For example, Fagerberg (2005) emphasizes the systemic nature of innovation processes, and argues that firms do not usually innovate in isolation, but rather in collaboration and through interde-

<sup>1</sup> Corresponding author, martin.ronningen@hil.no

pendent relationships with other organizations. Many subsequent studies support Fagerberg's (2005) assertion by demonstrating that the innovative capacity of individual firms tends to increase alongside inter-organizational relationships in these firms. In turn, such relationships often lead to benefits with respect to information diffusion, the exchange of knowledge, inter-organizational learning, resource sharing, access to specialized assets or the joint development of new skills or ideas (Edquist, 2005; Edquist *et al.* 2001; Hipp, 2010; Lazzeretti & Petrillo 2006; Pechlaner *et al.* 2005; Powell & Grodal, 2005; Rønningen, 2010b; Sørensen, 2007). Potentially, collaborative partners include other firms in the same industry, firms in related industries, along with consultants, suppliers, and non-firm entities such as universities, institutes and public authorities (Edquist, 2005; Edquist *et al.* 2001). This paper deals particularly with how systemic features affect innovative activities in the rural tourism enterprises, as well as the influence of the combination of systemic features and internal driving forces, such as management and strategy.

In this paper, we define rural tourism, or more precisely, rural tourism enterprises, in a rather pragmatic way. As a concept, rural tourism is difficult to define, and often impossible to find a commonly accepted definition for, or an agreed set of characteristics (Hall *et al.* 2009; Sharpley & Sharpley, 1997). The subject under consideration in this paper is innovation in rural enterprises. The definition of tourism should then focus on the supply side, that is, the tourism industry. According to Leiper (1979), the tourist industry comprises firms, organizations and facilities intended to serve the needs and wants of tourists. If we add two of Lane's (1994) characteristics of rural tourism, i.e. tourism operations located in rural areas that are rural in size (small scale), we adopt the following rather pragmatic definition: the rural tourism industry is a tourism industry located in rural areas, comprising enterprises that are rural in scale, that is, they are small-scale enterprises. The methodology section presents a more specific operational definition.

## **Review of the literature and theoretical framework**

### **Systems of innovation**

According to the innovation literature, a variety of interactional patterns appear to improve the innovative capacity of individual firms (Hipp, 2010; Mattsson *et al.* 2005; Powell & Grodal, 2005; Rønningen, 2009, 2010b; Sundbo & Gallouj, 2000; Sørensen, 2007). The system of innovation (SI) approach is one such pattern, and the perspective of the SI has gained much attention among innovation researchers during the last twenty years. As we are searching for systemic features and the rudiments of innovation systems involving the rural tourism industry, we first briefly discuss the

concepts of national, regional and sectorial innovation systems. We then assess the suitability of the SI perspective for the analysis of innovation in rural tourism.

The first scholarly interpretations of the innovation system were on the national innovation system and the expression 'national system of innovation' (NIS) introduced by Freeman (1987). For the most part, Freeman (1987) emphasized the network of public and private organizations whose activities and interactions led to the development and diffusion of technology. Later, Lundvall (1992) emphasized interactive learning and the interaction between user and producer in his analysis, and argued that the structure of production and the institutional set-up were the core elements of the system, while Nelson and Rosenberg (1993) emphasized the organizations that support the development and diffusion of knowledge as the decisive sources of innovation. More recently, Edquist (2005) pointed out that these researchers have mostly defined NISs by using factors or determinants that affect innovation processes. However, they generally singled out different factors, and apparently do not completely agree on the definition of the NIS (Edquist, 2005). In any case, NIS focuses on the national or macro level, which is not necessarily appropriate in the study of small-scale firm behaviour.

Another alternative is the concept of a regional innovation system (RIS) introduced by Cooke *et al.* (1997). The questions posed are similar to those for NISs, but at a lower and more limited geographic level. RIS thus constitutes firms located in a given region, often displaying clustering tendencies, and any supportive knowledge infrastructure (universities, research institutes, vocational training organizations, etc.) (Asheim & Gertler, 2005). RIS then consists of the organized elements of knowledge infrastructure that interact and support innovation within the production system of a region (Asheim, 2011). A central idea is that a rapid response to external change relates to regional institutional characteristics and spatial proximity between the many stakeholders within a region.

The third and final system specification is the sectorial innovation system, which focuses on a group of firms that develops and manufactures the products of a specific sector and that generates and utilizes the technologies of that sector (Edquist, 2005). This perspective draws on the premise that different industries or sectors operate under specific technology, knowledge and regulatory regimes. By mobilizing specific constellations of regimes, particular combinations of opportunities arise in the sector (Malerba, 2004). The dominant commercial players are firms that interact in their efforts to renew products or develop new market positions. The ties between regulatory actors, creative industries and other actors are then crucial for the dynamics and continuity of the system. Institutionalization, or the development of the norms, rules and routines (the so-called "rules of the game") that regulate these relationships and the interaction between

the actors, are then an influential factor in the functional capacity of the systems (Geels, 2004; Malerba, 2005).

It would seem that a fundamental idea in innovation system theory is the existence of rather strong and stable relationships where impulses are spread relatively quickly within the system (Asheim and Gertler, 2005; Edquist, 2005; Malerba, 2005; Sundbo & Gallouj, 2000). For example, new knowledge or new technology will disseminate easily within the system if captured by one node. This also means that the system actors easily absorb ideas such as new operating conditions, market changes and new funding policies, and generally adapt dynamically to major changes in the environment. Learning is the basic system feature that provides these dynamics (Cooke, 2001; Edquist, 2005; Edquist *et al.* 2001; Malerba, 2005).

Several scholars have maintained that systems such as those described above do not include the tourism industry (Hjalager, 2002; Sundbo *et al.* 2007). However, in a study of ten Scandinavian tourist destinations, Hjalager *et al.* (2008) assert the presence of innovation systems in tourism. At best, we characterize these cases as systemic patterns within small geographical units. Nor have the researchers identified institutional aspects. Accordingly, these systems appear to have much in common with the phenomenon that other researchers have characterized as local tourist systems (Guia *et al.* 2006; Prats *et al.* 2008). For example, Mattsson *et al.* (2005) also use the concept of innovation systems to characterize local and very limited systems at the destination level. Mattsson *et al.* (2005) stress, however, that their cases are networks rather than institutionalized innovation systems. Other variants of collaborative structures that promote innovation have also been demonstrated, but again the structures do not meet the requirements of the innovation system described above (Kvam & Stråte, 2010; Rønningen, 2010b). More generally, Sundbo and Gallouj (2000) and Miles (2005) maintain that the service industry in general (including tourism) barely relates to any institutionalized innovation system.

Instead, Sundbo and Gallouj (2000) assert that service firms may be part of loosely coupled systems that facilitate and promote innovation. They further maintain that experience-based knowledge dominates knowledge bases in these loosely coupled systems, and that the relations and interactions between industry actors are not very fixed. Hence, we cannot theoretically recognize these loosely coupled systems as a steady, coherent explanatory model in the same manner as an institutionalized innovation system. However, we can identify actors, trajectories and interactional elements and formulate some principles of typical behaviour (Sundbo & Gallouj, 2000). Furthermore, Sundbo and Gallouj (2000) underline the importance of the combination of systemic features and firm internal drivers, such as management, strategy and employees, resulting in specific innovation patterns. As the rural tourism industry is the chosen context of our

study, it appears to be most appropriate to focus on interactional patterns, systemic features and the idea of loosely coupled systems rather than any institutionalized systems of innovation.

### **Systemic features of the rural tourism industry**

Even if rural tourism firms are not embedded in institutionalized innovation systems, they may have reasonably steady relationships with competitors, suppliers, consultants, customers, governmental bodies and other actors. Such relationships may also lead to various benefits with respect to resource sharing, access to specialized assets, information diffusion, the exchange of experiences and knowledge, and inter-organizational learning (Powell & Grodal, 2005). In short, different configurations of relationships and networks may affect the knowledge base and innovative capacity of firms (Sørensen, 2007). One interpretation of the rural tourism industry is as a sector unified by some linked product groups. For example, Malerba (2005) argues that firms in any sector share some common knowledge, and therefore a specific knowledge base may characterize any sector. Thus, actors in interaction, including rural tourism firms, government bodies, suppliers and consultants, may have access to the knowledge base and potentially contribute to its development. Consequently, relationships are important pathways for the diffusion and exchange of knowledge, which in turn potentially strengthen the innovative ability of individual firms.

For a number of reasons, it is reasonable to anticipate that bundles of rural tourism firms may have frequent relationships with each other because they have some common interest relating to a similar technology, product or market. For example, tourism firms may be members of the same destination or regional organization, or they may collaborate to develop product packages or join forces to carry out marketing campaigns or to finance some kinds of common goods, such as tourist information, pedestrian walkways or even ski trails (Fyall & Wanhill, 2008; Rønningen & Sæter, 1995; Walker & Walker, 2011). Firms may interact to access or share new ideas, information and knowledge in general. Hence, we can derive a hypothesis about the possible effects of collaboration: through collaboration, rural tourism firms develop and share an industry-specific knowledge base that increases the innovative capacity of individual firms and the number of innovations implemented. It is reasonable to anticipate that this knowledge base is dominated by experience-based knowledge, partly because the level of education is rather low in tourism firms, a feature quite typical of the service industry in general (Sundbo & Gallouj, 2000), which in turn hampers the interaction between scholars and firms (Hjalager, 2002; NHD, 2008). We may yet interpret this experienced knowledge base as a kind of a knowledge trajectory in line with Sundbo and Gallouj's (2000) un-

derstanding of this concept, i.e. ideas, logic and knowledge in their broadest sense as diffused through social systems. The knowledge base shared by interacting firms may then be of significance for the innovative efforts of individual firms.

In Norway, firms, including tourism firms, may apply for public funding under certain conditions and purposes. It is reasonable to expect that the receipt of public grants will increase the financial ability of firms to introduce innovations (Lien & Teigen, 2009). By applying for public grants, firms also interact to some extent with the government agencies in question: this interaction potentially consists of counselling and the exchange of information and advice. Accordingly, the relational interface between government bodies and firms may also be a knowledge channel that influences the innovative ability of firms. We expect that these interactions increase the innovative ability of firms, through contact either with government agencies leading to public grants and increased financial capacity or through counselling or advice.

### **Internal driving forces**

Even though the focus of this study is the importance of external relationships, it is important to include internal qualities in our analysis of the innovation activities of rural tourism firms. This is because the interplay between external relationships and internal properties brings about innovation (Edquist *et al.* 2001; Sundbo & Gallouj, 2000). For instance, Sundbo and Gallouj (2000) revealed that the main internal driving forces in service firms were management, strategy and employees. Employees may be a source of knowledge and information that is relevant to the innovation capacity. As an example, Salte's (2007) analysis of innovation in Norwegian industries suggested that enterprises perceive information from their employees as relatively more important than information from external sources. The involvement of employees in innovation processes can then mobilize and trigger information, experiences and knowledge, either codified or tacit, which in turn may result in some kind of organizational learning (Argyris & Schön, 1996; Karlsen, 2008). We thus expect that the involvement of employees in developmental processes tends to increase the firm's innovative ability. If employee competence is important, we can also deduce that the efforts of employers to increase employee qualifications and competences will improve the innovative capacity of enterprises (Edquist, 2005).

Because information, knowledge and learning are conditions for innovation, it is also reasonable to assume that enterprises that give priority to obtaining relevant information from external sources such as market information will increase their knowledge relevant to innovation capacity. Several studies have also argued that information and requirements

from the demand side may be a valuable source of information in services (Edquist, 2005; Edquist *et al.* 2001; Miles, 2005; Sundbo & Gallouj, 2000). On this basis, we derive the following hypothesis. Firms that give priority to obtaining relevant information from external sources (for example, market information) implement more innovations than firms that do not. In principle, the size of the firm is a firm internal variable of relevance. Studies have documented that innovation capacity positively correlates with business size (Mohnen *et al.* 2006; Salte, 2007). As we define the rural tourism firms in this study as small-scale firms, there is limited variation in firm size. Consequently, we only employ this variable as a control variable in the analysis.

### **External actors**

We use this section to identify some external actors that are not included in the concept of knowledge trajectories, but which are embraced in the model of loosely coupled systems (Sundbo & Gallouj, 2000). Besides knowledge trajectories and internal driving forces, Sundbo and Gallouj (2000) identify a number of external actors that influence the efforts of firms to increase its innovation activities, that is, competitors, customers and suppliers. Sundbo and Gallouj (2000) argue that competitors may affect other firms merely because they compete, and this market competition forces firms to be innovative. Furthermore, customers may affect firms by demanding qualities as valuable experiences, tailor-made services and service quality in general. Finally, suppliers may affect the innovation ability of firms through the supply of technical equipment, etc. As discussed later, our data set does not provide sufficient information to test these assumptions about external actors, but does provide some indications that we will comment about later.

### **Hypotheses and a conceptual model**

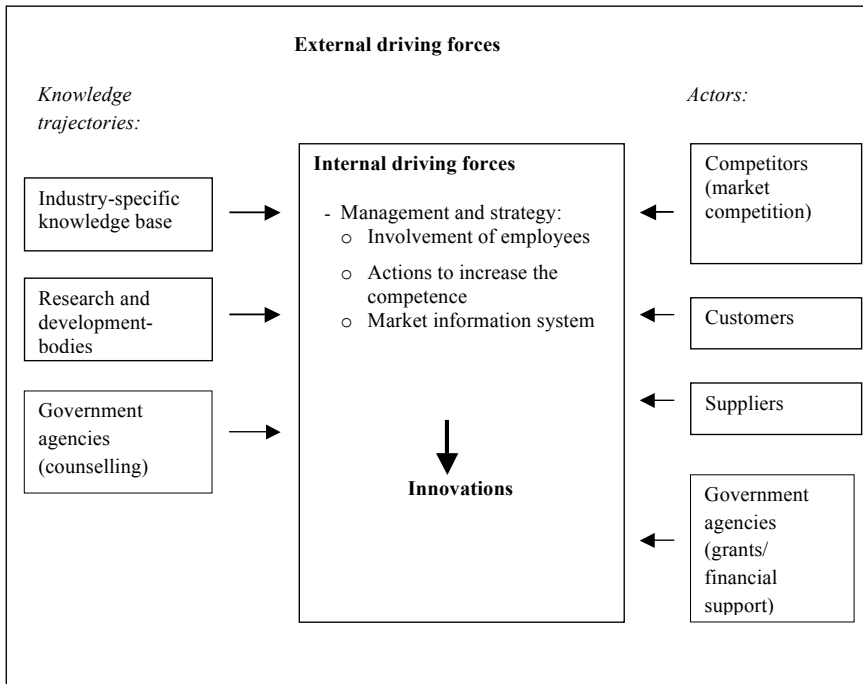
The hypotheses we deduce using the above discussion are as follows:

- H1 Rural tourism enterprises participating in appropriate co-operation are more innovative.
- H2 Enterprises that qualify for public grants are more innovative.
- H3 Enterprises that give priority to obtaining relevant information from external sources, for example, market information, are more innovative.
- H4 Enterprises that involve employees in the developmental processes are more innovative.
- H5 Enterprises that take actions to increase employee competencies are more innovative.



By supplementing these hypotheses with some inspiration from Sundbo and Gallouj's (2000) model of the loosely coupled system, we can develop the conceptual model presented in figure 1.

Figure 1 – A conceptual model of the rudiments of an innovation system promoting innovations in rural tourism enterprises



The model shown in figure 1 differentiates between external and internal drivers of innovation. The left-hand side of the model shows that in principle rural tourism enterprises may have access to several kinds of knowledge bases or sources, even if we expect the industry-specific and experienced knowledge base to be the main knowledge source. Three internal driving forces are included, reflecting hypotheses H3–H5. Besides knowledge trajectories and internal driving forces, Sundbo and Gallouj (2000) point at some external actors that may influence the efforts of firms to increase their innovative activities, i.e. competitors, customers and suppliers. These actors are needed to complete the model, even though we do not have the requisite data to test the effects of market competition or the direct influence of customers on the firm innovation activities. The model also differentiates between two possible outcomes of the interaction between firms and government agencies. The first outcome relates to knowledge transfer (advice and counselling), while the second outcome relate

to public grants that potentially increase the financial capacity of firms to implement innovations.

## Method

The data set examined in this paper is a section of a survey including a representative sample of 452 Norwegian tourism enterprises. We define the population of tourism enterprises by selecting all enterprises with several specific codes in the Standard Industrial Classification (Statistics Norway, 2009a), including hotels, camping sites and other providers of short-stay accommodation, restaurants, bars, canteens and catering, travel agencies, tourist offices, tour operators, tour guides and leaders, and adventure, event and activities operators. We also include other tourist-related activities, fair and amusement park activities, museums activities, activities and adventure companies and other recreational services. All interviews in the 2008 survey were by telephone, with 452 enterprises (34.8 per cent of the total sample) responding to the questionnaire.

The response rate is rather low. The loss of response is a quite well-known problem with the use of voluntary surveys. If the loss brings about systematic bias, for instance, significantly too high or low shares of some categories of respondents, the analyses may give more or less incorrect conclusions. The loss of response has, however, been analyzed by a comparison of the population and the sample, and the analyses did not reveal significant bias, except the higher loss of micro-enterprises without employees compared to enterprises with employees (Rønningen, 2009). The regional distribution of enterprises is quite good, with regard to the enterprises' localization across the main regions of Norway (Northern, Western, Eastern, Southern regions and the region of Mid-Norway). The distribution of enterprises by tourism industries is also fairly good, with quite appropriate shares of enterprises belonging to the different tourism industries (i.e., the accommodation business, the food and beverage business, adventure, activity and attraction business and tour operators and travel agencies). As already indicated, the variation of enterprises' size is satisfactory except for a certain underrepresentation of the very small businesses (with no employees). We may then conclude that the sample seems to be quite representative regarding the characteristics of regional localization, the mix of tourism businesses and size (Rønningen, 2009).

We can interpret at least part of the sample as rural tourism enterprises. As discussed earlier, we employ two commonly used criteria to define rural tourism: namely, localization and the size of the enterprise (Lane, 1994; Rønningen, 2010a; Sharpley & Sharpley, 1997). As a result, we define the rural tourism industry as consisting of small-scale tourism enterprises located in rural areas. We employ a rather pragmatic operational definition of small-scale enterprises, that is, enterprises with ten employees or fewer

(including both full- and part-time employees). This size criterion is the same as in the definition of microenterprises proposed by the European Union (Wägar *et al.* 2007). We identify enterprises in rural areas using a geographic criteria based on Statistics Norway's (2009b) centrality index. More precisely, our definition of rural areas comprises municipalities included in the three lowest levels of geographic centrality in Norway. According to this demarcation, rural areas are remote settings with low population densities, located relatively distant from major urban settlements and regional centres. After applying these criteria, we find that the full sample of 452 Norwegian tourism enterprises includes 133 rural tourism enterprises. With regard to the regional distribution 27 percent of the rural tourism enterprises were located in Northern Norway, 17 percent were located in Mid-Norway, 19 percent in Western Norway and 37 percent in Eastern and Southern Norway. Forty-three percent of the enterprises represented the accommodation business (i.e., small hotels and motels, camping sites, cottages and farm buildings), 31 percent represented the food and beverage industry, 11 percent were travel agencies, tourist offices, tour guides or leaders, and 16 percent were museums, activities/event/adventure operators or small amusement parks. The variance of each variable is satisfactory (see table 1).

We employ the Community Innovation Survey's operational definition of innovation used in the fourth survey carried out in 2004 (CIS IV) (Salte, 2007). CIS IV differentiates between four kinds of innovation: product innovation, process innovation, organizational innovation and marketing innovation (OECD, 2005). To start with, product innovation is the introduction into the market of a new good or service or a significantly improved good or service with respect to its capabilities. Process innovation is the implementation of a new or significantly improved production process, distribution method or support activity for the enterprise's goods or services. An organizational innovation is the implementation of new or significant changes in a given enterprise's structure or management methods intended to improve the enterprise's use of knowledge, the quality of goods and services or the efficiency of workflows. A marketing innovation is the implementation of new or significantly improved designs or sales methods in order to increase the appeal of the enterprise's goods and services or to enter new markets. In the survey, firms were to report innovations implemented during the period 2004-2007.

In the analysis, we specify the variable "Total innovation activities" as the measure of the firm innovation. This variable indicates how many types of innovations (product, process, organizational or marketing innovation) the firms have implemented. The variable of total innovation activities has the following values: 0 – none of the four innovation types were implemented; 1 – one of the four innovation types was implemented; 2 – two of the four innovation types were implemented; 3 – three of the four

innovation types were implemented; and 4 – all four innovation types were implemented. We employ multiple regression analysis to test the hypotheses in question regarding the effects of external relationships as well as the internal driving forces in enterprises on innovation activities. Afterwards, we briefly consider the partners that these rural tourism firms collaborate with to identify the actors included in their relational interfaces.

## Results

### The variables used in the analyses

According to our hypotheses, the independent variables are co-operation, the involvement of employees in the enterprise's development processes, the enterprise's actions to increase the competence of employees, market information systems and public grants. In addition, we include variables indicating the size and age of the enterprise as control variables. Table 1 provides selected descriptive statistics for these variables.

*Table 1 – Descriptive statistics for the variables included in the analysis (number of respondents, average score, standard deviation, minimum and maximum values of the variables)*

Variable	N	Average	Std. dev.	Min.	Max.
Total innovation activities	133	1.97	1.46	0	4
Market information system	133	2.22	1.79	0	7
Co-operation	133	0.41	0.49	0	1
Public grant	133	0.23	0.42	0	1
Involvement of employees	133	0.38	0.49	0	1
Action to increase competence of employees	133	0.21	0.41	0	1
Size of enterprise (number of employees)	133	4.50	2.64	1	10
Age of enterprise	128	2.78	1.32	1	5

Total innovation activity in table 1 is the sum of the four major types of innovation (i.e., product, process, organizational and marketing innovations). On average, the sample enterprises implemented 1.97 major types of innovation during the period 2004-2007. We specify total innovation activity as the dependent variable in the regression analysis. The first explanatory variable in Table 1, market information system, indicates how many steps the enterprise undertook to gather information about customer evaluations of the enterprise's services, including potential market segment needs and preferences, market trends, competing enterprises, etc. On average, enterprises undertook 2.2 steps. This variable touches upon the acquisition of knowledge and learning processes relevant to innovation. The next explanatory variable indicating co-operation is dichotomous, and

reflects co-operation established to improve innovative capacity during the period 2004–2007, where a value of one indicates that an enterprise was involved in co-operation to increase its innovation capacity, and which is otherwise zero. The average score of 0.41 shown in Table 1 indicates that 41 per cent of the enterprises participated in this kind of co-operation.

The third explanatory variable, public grants, is also dichotomous, where a value of one is the public grants received by the enterprise, and which is otherwise zero. The average of 0.23 indicates that 23 per cent of the enterprises obtained some kind of public grant. The fourth explanatory variable, involvement of employees (in the enterprise's developmental processes), is again dichotomous, with a value of one indicating that the enterprise involved employees in these processes, and which is otherwise zero. The average of 0.38 indicates that 38 per cent of the sample enterprises had involved employees in the enterprise's developmental processes. The fifth explanatory variable, action to increase employee competence is again dichotomous, indicating whether the enterprise had taken actions to increase the competence of employees. The average of 0.21 indicates that 21 per cent of the sample enterprises had undertaken such efforts.

As discussed, we also include enterprise size and age as control variables. The average enterprise size shows that the enterprises had an average of 4.5 employees, including both part- and full-time employees. The variable age for enterprise is ordinal, where 1 indicates that the enterprise was less than 5 years old, 2 – between 5 and 10 years of age, 3 – between 11 and 20 years of age, 4 – between 21 and 40 years of age, and 5 – more than 41 years of age. As shown in Table 1, the average score is 2.8, which indicates that the enterprises on average were closest to the category of 11 to 20 years of age.

### **Regression analysis**

Table 2 presents the results from the regression analysis.

We first tested for heteroscedasticity using the Breusch–Pagan/Cook–Weisberg test and for multicollinearity using variance inflation factors (Wooldridge 2000) and found no evidence of significant problems in either case. Overall, the regression analysis generally demonstrates that the market information system, co-operation, public grants and actions to increase employee competence tend to increase the ability of enterprises to implement innovations.

As shown in Table 2, the regression coefficients indicate that the enterprises implemented about 0.2 major types of innovation as enterprises carried out one more actions to obtain market information (coefficient = 0.167,  $p < .01$ ). Enterprises which participated in co-operation implemented on the average 0.9 more major types of innovation compared with enterprises that did not join in co-operative efforts (coefficient = 0.879,  $p <$

.001). Furthermore, enterprises which received public grants implemented on average 0.6 more major types of innovation than enterprises that did not (coefficient = 0.569,  $p < .05$ ). Finally, enterprises which had taken actions to increase employee competence on average implemented about 0.7 more major types of innovation than enterprises that did not (coefficient = 0.637,  $p < .01$ ). The explained variance (adjusted  $R^2 = 0.41$ ) is relatively high, suggesting that the model fits the data quite well.

*Table 2 – Regression analysis with total innovation activities as the dependent variable. Multiple regression analysis, ordinary least squares. Regression coefficients, t-statistics in parentheses*

Predictor	Estimate
Size of enterprise	0.0572 (1.39)
Age of enterprise	-0.0570 (-0.73)
Exporting orientation	0.291 (1.31)
Market information system	0.167** (2.90)
Co-operation	0.879*** (3.90)
Public grants	0.569* (2.19)
Involvement of employees	0.236 (0.92)
Actions to increase employee competence	0.637** (2.45)
Constant	0.678* (2.20)
$R^2$ adj.	0.41
N	128

\*  $p < .05$  \*\*  $p < .01$  \*\*\*  $p < .001$  (one-tailed test)

In short, we verify all of the hypotheses except H3. The analysis actually indicates that the involvement of employees in the developmental processes did not affect the total innovation activities. However, the actions of enterprises to increase employee competence and actions to obtain market information tended to increase total innovation activities. In other words, we have identified two internal driving forces of innovation: the enterprises' actions to obtain market information and actions to increase employee competence. The analysis also demonstrates that collaboration established to improve the innovative capacity of participants in fact increased the abil-

ity of the enterprise to implement innovations. Finally, enterprises that interacted with governmental agencies to acquire public grants were more innovative than other enterprises.

### **Patterns of a system that promotes innovation in the rural tourism industry**

The analyses demonstrate that the collaborative relationships of enterprises and the ability to gain public support enhanced their capability for innovation. This finding indicates that systemic features are beneficial for the innovation capacity of enterprises involved in such external relationships. However, there appears to be interplay between these systemic features and internal driving forces in the firm. By combining external and internal driving forces, we can potentially identify patterns of innovation that have much in common with Sundbo and Gallouj (2000) as revealed in their study of service innovation. In order to strengthen our basis for the description of innovation patterns, we provide additional information about the collaborative partners.

*Table 3 – Actors with whom the rural tourism enterprises collaborated (N = 133)*

Collaborating partners	Per cent
Other tourism enterprises	35
Suppliers	6
Consultants	2
Customers	6
R&D bodies (universities, research institutes)	4
Government agencies (interactions relating to the receipt of public grants)	23

The figures in table 3 reveal that rural tourism enterprises primarily collaborated with other tourism enterprises. Furthermore, a significant share of rural tourism firms (23 per cent), reported that they received financial support from the public funding agencies. This interaction may have been associated with the application for economic support. Nevertheless, it is possible that the application process also brought about counselling or the exchange of knowledge to some extent. Quite a few rural tourism enterprises co-operated with suppliers, consultants, research bodies or customers to increase their innovation capacity. Overall, Table 3 demonstrates that rural tourism enterprises have two dominant interactional interfaces, namely, firms in the same trade and government agencies, respectively. These relationships may represent certain channels of knowledge transfer or trajectories.

Even if we focus only on systemic features, these are only a means to improve the innovation capacity of individual firms. We should also be

aware of the qualities of individual firms. Table 2 reveals two internal drivers of innovation: namely, employees and the efforts of firms to acquire market information. The information in Table 2 also shows that firms that mobilized their employees and had the ability to develop an internal market information system as well as external relations, tended to be the most innovative. In other words, the combination of systemic features and internal qualities fosters innovation.

## Discussion and conclusions

The information in tables 1 to 3 generally indicates a pattern of innovation in the rural tourism industry in Norway. First, we found that many rural tourism firms are innovative, with many implementing innovations during the three-year survey period. Second, we find that firm innovations were partly influenced by internal drivers, partly by external drivers, and partly by the interplay between internal and external driving forces. In terms of external relations, we found that rural tourism enterprises generally had poor relations with the producers of knowledge (research & development bodies [R&D]) and knowledge mediators (consultants), with the pattern of interaction dominated by external relations with other firms in the same trade (competitors). If this interactional pattern involved development or the exchange of information, ideas, recommendations or other kinds of knowledge or expertise, then it is reasonable to assume that rural tourism firms shared an industry-specific knowledge base or a kind of a knowledge trajectory. However, it is unlikely that strong formal qualifications characterized this knowledge base because the level of education in tourism is relatively low (NHD, 2007). While this knowledge base could have contained elements of codified knowledge, it largely contained experience-based industry-specific expertise.

Unfortunately, our data set does not provide sufficient information or ample basis for judging the strength of the abovementioned knowledge trajectory. For example, we do not know how fixed and stable the relationships were, and the analyses in this paper yield only some indications about the extent and strengths of the relationships. Nonetheless, it is reasonable to interpret the collaborating pattern as an interesting rudiment of a network or a system that gives individual firms access to some kinds of knowledge, thereby representing the germ of a knowledge trajectory. However, we need more research to improve our understanding of the opportunities and constraints of this network as a channel for knowledge transfer.

We also found that a significant proportion of rural tourism firms received public grants, and that in at least some way, these firms therefore interacted with government agencies. If the enterprise confined this interaction to the application for financial support or procedures relating the application, then the government agencies only had the role as an external



actor (cf. figure 1). However, the interaction may have also included counselling and the transfer of advice and knowledge. In that case, the government agencies may have acted as a source of knowledge or part of a knowledge trajectory. The data set does not provide information about the importance of this knowledge source, and therefore we should address the role of government agencies as a provider of knowledge in future work.

Several existing studies argue that the role of customers in innovation is a key feature of service innovation processes (Edvardsson *et al.* 2010; Fuglsang, 2008; Sundbo & Gallouj, 2000). Consequently, it is somewhat surprising that few firms have involved customers in innovation processes. However, the information in Table 1 indicated that many firms had undertaken actions to gather market information, while the estimates in Table 2 demonstrated that the quality of the firm's market information systems affected their ability to implement innovations. However, even if the firms did not involve customers in the innovation processes, they may have acquired information about customers, market segments, competitors and trends. In turn, market information tends to increase the number of innovations implemented. Table 2 also shows that the involvement of employees did not affect firm innovation activities. One possible explanation could be that the rural tourism firms have few employees, whom are often part-time, or they only have a few people temporarily employed during the main season (for example, in summer). It may then have been difficult to involve employees in the innovation process because they were not a stable part of the business.

We can now draw some conclusions using the results of our analysis. With regard to the systemic features of innovation in the tourism industry, our results show that appropriate relationships to external actors tended to increase the innovation activities of individual companies. These systemic features also have certain similarities with the sectorial innovation systems, as described in the literature. We found that an important element was the co-operation between enterprises. Another important element was the network of contacts to the public funding and support system. We may interpret these as two components of an innovation system. However, the question of the stability of these relationships is not clear in the survey results, as the data provide no information about the institutional aspects understood as rules, norms and sanctions relating to the interaction ("the rules of the game"). Consequently, we do not have sufficient information about institutional aspects and the characteristics of the networks to determine if the systemic features represent an innovation system in the usual sense. Furthermore, few rural tourism firms co-operated with universities and R&D institutes. We would normally regard fixed and steady relations between (clusters of) firms and universities and R&D bodies as a characteristic feature of innovation systems. The systemic features revealed in our study do not fulfil this requirement. Hence, we have not identified a comprehensive innovation system.

It is likely that the described relationships better fit the phenomenon that Sundbo and Gallouj (2000) portray as loosely coupled systems that promote innovation. Sundbo and Gallouj (2000) use this term to characterize the driving forces and patterns of innovation in the service sector in general. Experience-based knowledge, including innovation activities with a rather low degree of organization and little emphasis on systematic learning, are typical of such systems. Moreover, the relationships are not strong and stable and the behavioural patterns are constantly shifting. However, shifting relationships and interaction patterns do not necessarily characterize all the systemic features found in the rural tourism sector. This study shows that the collaborations between tourism firms had a certain stability and durability of at least several years. This also implies that there were certain norms and associated sanctions related to the interaction. These are almost a sociological necessity if the interactions are to survive over time. On the other hand, we do not know how extensive and strong these norms are. The in-depth study of the relationships, interactional patterns and related institutional features is then a task for further research. What we can ascertain is that collaboration and public support measures tend to increase the innovation capacity of individual enterprises.

We now have grounds to infer an innovation pattern in the Norwegian rural tourism industry characterized by internal driving forces and enterprises connected to a larger network. A set of relationships characterized as collaborative relationships between firms probably represent channels for knowledge exchange. Another set of relationships relates to government agencies that offer funding and business support. These relationships are probably of a temporary nature, but may serve as important channels of access to advice, guidance and business support. Furthermore, enterprises that in their own way innovate strategically by involving employees in development and by working systematically on knowledge building and collecting market information the patterns of innovation characterize these networks. Of course, we should consider this study only as a preliminary quantitative analysis of innovation and the systemic features of the rural tourism industry that we should follow with further in-depth studies including dynamic aspects of these relationships.

Finally, it is reasonable to comment on the role of research-based knowledge. As discussed, this kind of knowledge does not appear to play any major role in our sample firms or the knowledge base of the rudimentary system we identified. This fact does not necessarily mean that the knowledge produced by universities or R&D institutes is irrelevant. As Hjalager (2002) has argued, the question is instead how we can transform such knowledge into practical knowledge and advice for enterprises. A simple recommendation is that rural tourism enterprises recruit employees with advanced formal qualifications. These staff may have the ability to identify scientific knowledge and translate this into industry-relevant advice and

recommendations. However, this may not be useful advice, at least partly because most small rural tourism firms do not have the financial capability to employ full-time specialists to carry out such work.

It may be more useful to suggest a multi-stage process of knowledge diffusion. The first step would be to process research-based knowledge into practical advice and guidance. The second step would be to convey and place this practical knowledge in an industry-specific knowledge base. Someone must then act as a mediator. For example, business consultants and advisors may have the necessary qualifications as facilitators and counsellors. Other mediators could be industrial organizations, destination organizations, or governmental agencies. If one or some firms in the network acquire the new practical-oriented knowledge, the conditions for further dissemination should be good because many firms interact to improve their innovative ability. This multi-stage process is in line with existing recommendations from several researchers already concerned with the problem of knowledge dissemination in the tourism industry (Hjalager, 2002; Pechlaner *et al.* 2005). However, further research is required to improve our knowledge of the conditions and effects of such diffusion processes.

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J. Spilková<sup>1</sup>  
D. Fialová

# Building fertile links with regional brands: The case of Czech regional products

## Introduction

The Common Agricultural Policy (CAP) of the European Union is shifting towards the formation of multi-functional agriculture and a rather pluralistic approach to rural development (Gray, 2000; Lowe, Buller & Ward, 2002; Du Puis & Goodman, 2005; Feagan, 2007). This shift is to a great extent supported by the increasing popularity of experience, authenticity and quality within today's consumer culture which demands unique goods. As regards the rural areas, a trend called *the commodification of the countryside*, has been already recognized (Urry, 1995) and some (mainly urban) consumers seek the rural experience as an experience of a nostalgic, healthy place, full of authenticity and taken for granted quality (Smith & Phillips, 2001). The same is also happening in post-communist countries, where lifestyles and trends are rapidly converging with those of their neighboring countries. After the so called *velvet revolution* of 1989 in Czechia, the country entered into a process of fundamental economic and social transformation. The transformational changes have also increased the disparities between the competitive metropolitan areas and the peripheral regions that are lagging behind. In this context, rural tourism may become one of the most auspicious activities for rural development and may create a preferential market for regional products. However, rural communities within the post-communist countries evolved under different conditions and the transformation of agricultural industry also took place in a different context. The local communities in these countries may well benefit strategically from the new trends in tourism and consumption (McCarthy,

<sup>1</sup> Corresponding author, spilkova@natur.cuni.cz



2006). There are, however, several problems in these areas which have to be solved before the creation of “fertile links” between diverse agents within the rural community begins (Lacher & Nepal, 2010).

Only recently have regional brands and different systems of quality branding been introduced in the Czech production and consumption landscape. This paper introduces the Regional Brand initiative of the Czech Association of Regional Brands (ARB) and its potential to create links within the viable rural tourism products. The first part introduces the context of the current focus on the diversification of rural economies, the need for bottom-up approaches and alternative rural development, all of which are clearly present in the idea of regional branding and similar schemes. These are described in the second section, of course with a stress on their development in Czechia. The following sections reveal the main aims of the paper and the methodology of the research conducted. The key part of the paper follows, with the main results of the survey as seen both from the producers’ and the coordinator’s view. The concluding part of the paper summarizes the main obstacles and problems and calls for stronger intervention, clear strategy and overall changes in the entrepreneurial environment.

### **Diversification of rural economies within the context of changing CAP priorities**

The CAP as a tool to support farmers was a response to the changing position of agricultural production during recent decades. The former, relatively narrowly defined, goals of the CAP that focused on financing the sector and production related support have been changing gradually since the 1990s. As a result of an increasing emphasis on environmental sustainability since the Rio Conference in 1992, the CAP increasingly reflects the ecological sustainability of farming and decreased subsidies for particular products (MacSherry reform). After the acceptance of Agenda 2000 and primarily with the creation of the second pillar of CAP, the pressure is on reducing the level of resources targeted directly at farmers to support their production and, rather, on increasing the resources aimed at fostering the environmental functions of agriculture, rural development and food security.

The CAP has targeted rural regions since the early 1990s, e.g. through the LEADER (Liaisons Entre Actions de Developement de l’Economie Rural) project, which has been one of the developmental tools of CAP since 2004. In contrast to centralized forms of support for agriculture, the LEADER initiative used the principle of bottom-up programming and encouraged the creation of networks between particular actors in rural development. LEADER is strictly based on a bottom-up approach with a high level of individuality and autonomy when creating and implementing particular development programs. Increasing the volume of CAP resources aimed at alternative farming during the last two decades, sustainable agriculture in

the landscape and rural development has led to the empowerment of local leaders, network creation and the linking of rural inhabitants and economic agents in the countryside.

Van der Ploeg (2003), as one of the first researchers, refers to alternative rural development which could be promoted by farm-based initiatives, multi-functional agriculture and localized quality food networks. Farm-based initiatives are conceived as

the catalyst of an alternative rural development, promising a different trajectory from the productivist model of the post-WWII agricultural settlement, whose dynamics have decapitalized farms, concentrated resource access and land ownership, impoverished rural communities, accelerated out-migration, devalued localized tacit knowledge, and devastated local ecologies (2003: 7-8).

For example, in the UK individual projects with EU structural funds and CAP, Pillar II grant schemes are supported particularly in regions where food and drink production tends to cluster. In some regions the public sector boosts local and regional economies by buying quality local products and improving catering services to clients and tourists.

Regional brands and other types of quality or authenticity certification are becoming one of the most important tools to support the development and promotion of rural regions. Watts, Illbery and Maye (2005: 35) argue that the defensive localism paradigm is already used in some European countries as a regional development tool. However, local producers, farmers and other agents in the regional production system in Czechia are still a rather diversified group without any prior links to each other before the introduction of regional branding. They often perceived each other as competitors, while the introduction of regional branding may present a common competitive advantage against the producers from outside the region. As Čadilová (2011: 10) states

ideally, a network of local businesspersons is formed including producers, farmers and service providers who supply goods to each other, use each other's services and create common activities.

There is a long way ahead before quality regional products will serve as a tool for the promotion, empowerment and alternative rural development and of rural regions.

### **Regional branding and quality certification as a potential tool for promotion and development in the Czech rural areas**

In today's call for sustainability, branding may also become a means to foster the sustainable development of peripheral areas with a major natu-

ral or cultural heritage (Parrot, Wilson & Murdoch, 2002). In the economic sense, branding enables the creation of links between small entrepreneurs or small or medium sized enterprises from the region by offering a common marketing denominator and identification with the region itself. The diversification of economic activities in rural areas helps the locals to maintain their jobs, to specialize and thus to prevent the outflow of people from rural areas. Regional brands are also a convenient tool for the development of rural tourism. The concept of regional brands in tourism includes not only the functional dimension (the product itself) but also its representative value. These brands also foster sustainable tourism and enable tourists to learn about the social and economic life in a particular region (Spilková & Fialová, 2012). Besides the promotion of economic activity rural tourism increases the sense of “community spirit” (Kneafsey, 2000). Branded products and often the possibility to meet the producers and visit their workshops or farms strengthen the region’s attractiveness to tourists (ARB, 2011 in Spilková & Fialová, 2013).

The regional branding in Czechia started in 2005. The first regional brands represented well-known mountain areas of Czechia (Krkonoše, Beskydy and Šumava) which later decided to establish the Association of Regional Brands in the Czech Republic. During the following years, other regions became inspired and nowadays there are eighteen regional brands incorporated in the association, sharing a common graphic style of branding and comparable granting principles (figure 1). These are: guaranteed origin, respect for the environment, the proportions of manual or intellectual input, the proportion of local raw materials etc. Branded products are most often handicrafts, foods, farm and natural products and in some cases accommodation and catering services. At the end of July 2012 there were already 543 branded products and 45 certified service providers in the database. The particular brands have different volumes of granted products and they differ in the system of their work, financial sources and fundraising abilities. Local government or institutions may also foster the branding system and support the producers and products. This support varies from passive dissemination of information to financial or material support, or the coordination and implementation of particular projects. It is also important to remember that systems of regional branding are known all over Europe and are supported by the European Social Fund’s *Experience sharing and formation of the international platform in the field of regional products support*. Nevertheless, other regional brands are arising and there are also other brands not part of the Association, created by particular tourism resorts or regions to promote their local products.

In the spring of 2010 The Czech Ministry of Agriculture started a new program which aims to foster consumer interest in local foods from particular regions. Within the framework of this campaign a *Regional Food*



### **Main aims of the paper**

This paper aims to depict how the producers with certified goods or providers of certified services perceive the regional brands and branding systems in general and how successful they are in their enterprises related to certified products. First, the paper identifies their experience and then their potential interest in becoming involved in the formation of complex rural tourism packages.

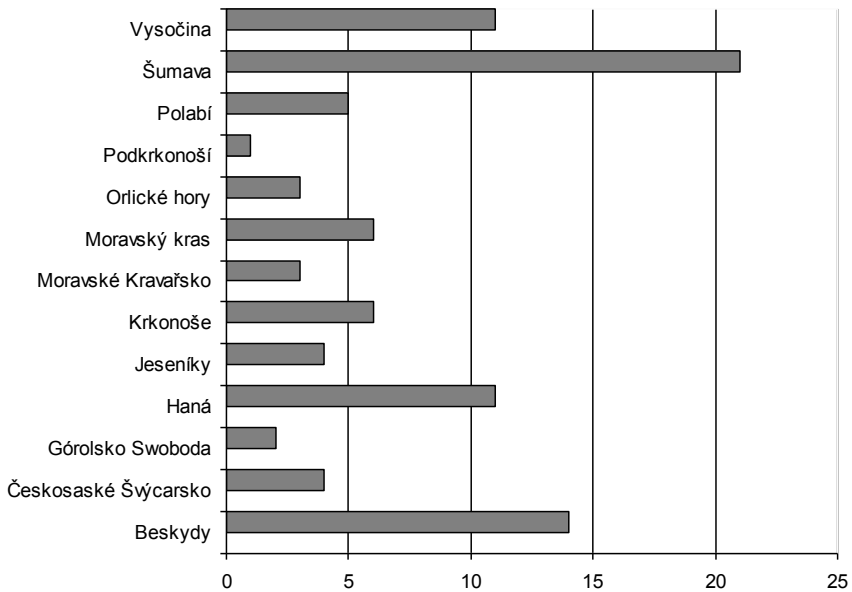
Second, in the light of the results from the first stage of the research, the paper tries to sketch out the main problems on the path to the successful creation of fruitful links between the regional brands and rural tourism as seen from the perspective of the coordinating body – the Association of Regional Brands.

### **Methodology**

As the first part of the research done for this paper, we conducted a questionnaire survey of certified goods' producers – mostly of food, drinks or artisan products. This survey aimed to depict the experience of these producers with the certification process, mainly the benefits or pitfalls of certification related to their enterprise. It also revealed the ways the branded products were promoted and some problems emerging during the production and distribution of products. The questionnaire then covered the issues of tourism products and the challenges of creating more complex tourism packages made by any combination with other products or services proceeding from the region (see also Spilková & Fialová, 2012).

The questionnaires were e-mailed to the producers of certified products and providers of certified services. The total sample covered the whole basic set of 282 producers as listed at July 1, 2011. Where producers had more than one certified product in the database, they were sent the questionnaire only once. Of the total of 282 questionnaires sent, 13 were returned as undeliverable, and of the remaining 269 respondents 91 questionnaires were completed and returned from 13 regions (figure 2). These questionnaires formed the usable response for further analysis. We consider the response rate of 33.8% as representative. Such a low response rate is quite usual in this type of survey when entrepreneurs are being surveyed (see Meester 2004; Spilková 2006). However, taking in consideration that the survey reached one third of the total sample of all the producers of the branded goods, the opinions of this provide a good insight into the perception of the branding systems and their use in the creation of tourist products. It is no surprise, that the highest number of responses (21) came from the most successful region of Šumava, where there is a long tradition and good experience with regional branding.

Figure 2 – Approached producers of certified products according to regions



Source: questionnaire survey.

The data gathered from the survey were recoded and organized in the database. Elementary descriptive statistical methods were used to analyze the data. First, the basic characteristics of the set are presented. Among the surveyed entrepreneurs, 51% produced regional artisan goods, 37% produced certified food products, 7% were regional drinks producers and the remaining 3% of respondents offered certified services which is proportional to the structure of the total sample of branded goods. The distribution of the respondents with respect to the year in which they received certification was relatively balanced with 20% in 2005, 2% in 2006, 9% in 2007, 20% in 2008, 16% in 2009, 21% in 2010 and 12% in 2011. The dataset thus included both experienced producers and the newly entered entrepreneurs.

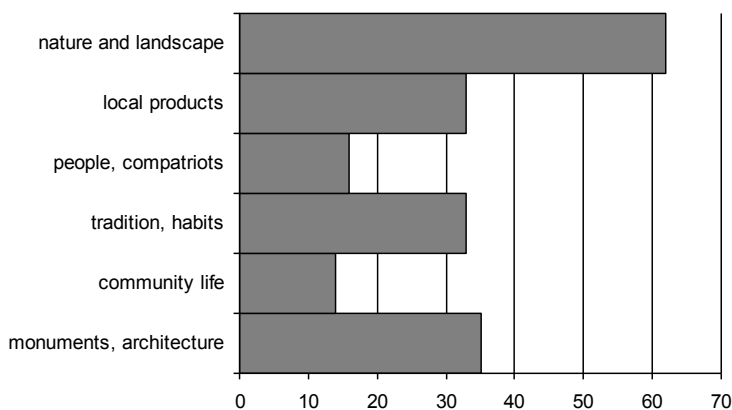
For the second part of this paper we used expert interview (a structured interview with open questions, Hendl, 2005) with the director of the Association of Regional Brands. The results of the first phase's survey were presented to the director and consequently the interview evolved around the two main issues – the problems on both the demand side of customers and the supply side of producers and their potential cooperation. The interview lasted one hour and forty minutes and was recorded and transcribed for further analysis of the responses. The key findings from the viewpoint of the association's director and her experience are presented in the second part of the results section.

## Main results

### The producers' view

When the respondents were asked about the main perceived attractors of their region, they mostly mentioned the quality of the natural environment and beauty and landscape (74%), 42% stated that the remarkableness of their region is based on the architectural highlights and historical monuments, 39% of respondents mentioned local traditions and habits and consequently local products as the main attractors of their regions. The results for this question are presented in figure 3. The natural beauty and typical rural landscapes are thus among the most important assets of the Czech rural regions. The preservation of nature and the environment and cultural aspects are also among the most cited aspects of the new rural paradigm.

Figure 3 – Main attractors of the particular region - the producers perception of what makes their region (the region of the brand) attractive



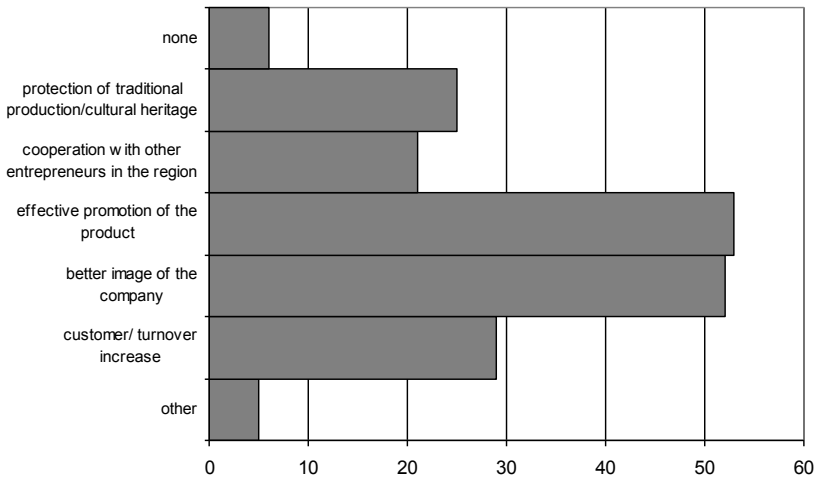
Source: questionnaire survey.

The next part of the survey was related to the regional brands. 84% of the respondents agree that certification is important for the regional producers and service providers, 14% think that the benefit of certification is only partial and only one respondent did not agree with the possible importance of branding and regional certification. This represents an obvious success of regional branding and similar schemes reflected in the stable demand for certification and the good results of such schemes elsewhere in Europe.

A question on the positive assets of regional branding revealed that producers benefit mainly thanks to a better image of the company and/or product and that the regional brand leads to more effective promotion

(64% and 63% of respondents respectively). 35% of respondents mentioned that certification helped to increase the number of their customers and/or their turnover. 30% of respondents mentioned the importance of regional branding for future protection of traditional artisanal production processes and cultural heritage in general.

Figure 4 – Main benefits of regional brands and certification - the producers revealed what was the benefit of the certification for their product or service based on their own experience



Source: questionnaire survey.

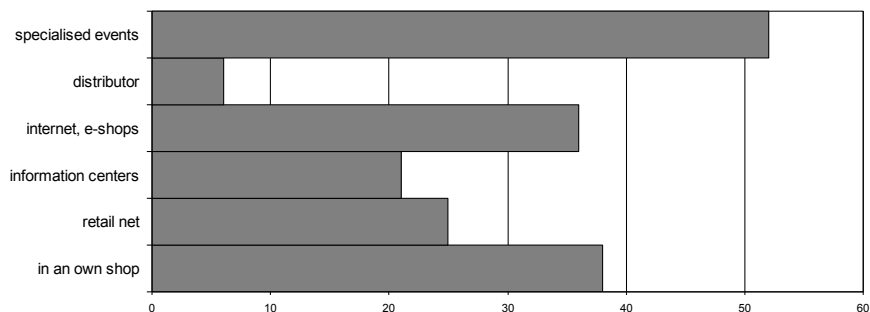
The majority of the producers sell their products at special selling events (markets, pilgrimages, cultural events - 60%), 45% of respondents have the possibility to sell their production in their own shop, 41% use the Internet and e-shops to sell their goods, 30% supply their goods to classical retail facilities and the last frequently mentioned selling channel is through the information centres of particular tourist regions (24%). This clearly implies that regional products are closely interwoven with cultural events, traditional ways of selling and processing goods and a unique shopping environment in which they tend to be offered to customers and tourists.

As regards the promotion and marketing of the certified products, most of the producers use their own web sites to promote their products (75%), while the opportunity to sell the products at fairs, farmers' competitions and special events is also widely cited (51%). The use of brochures or marketing materials is reported by 42% of respondents. Other most cited means of promotion are advertisements in regional press (33%) or workshops and special events (25%). Two thirds of the respondents would welcome any help or guidance when it comes to marketing channels that would best suit their products, while another 26% of respondents also consider this help to



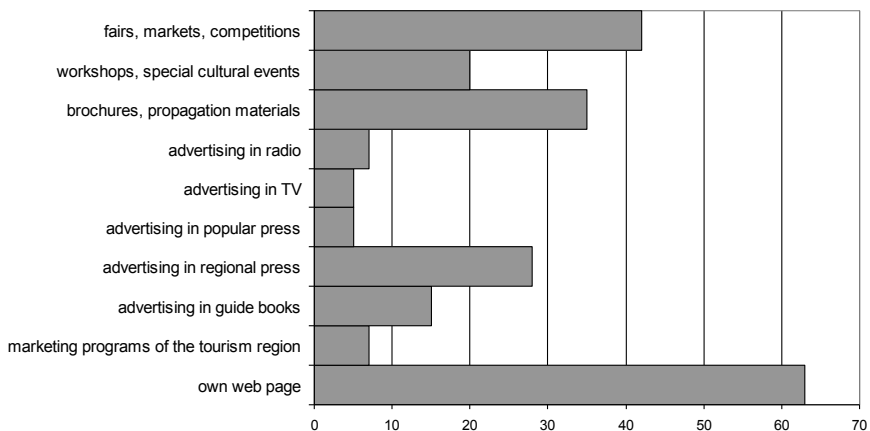
be appropriate. Some 35% of respondents also pursue some kind of market research for the needs of their enterprises – they question customers, they distribute questionnaires or they maintain a web based service.

Figure 5 – Place of sale realization - producers mentioned the distribution channels through which they distribute their products or where they sell their products most often



Source: questionnaire survey.

Figure 6 – Marketing channels of branded products - producers stated how and where they advertise their products most often



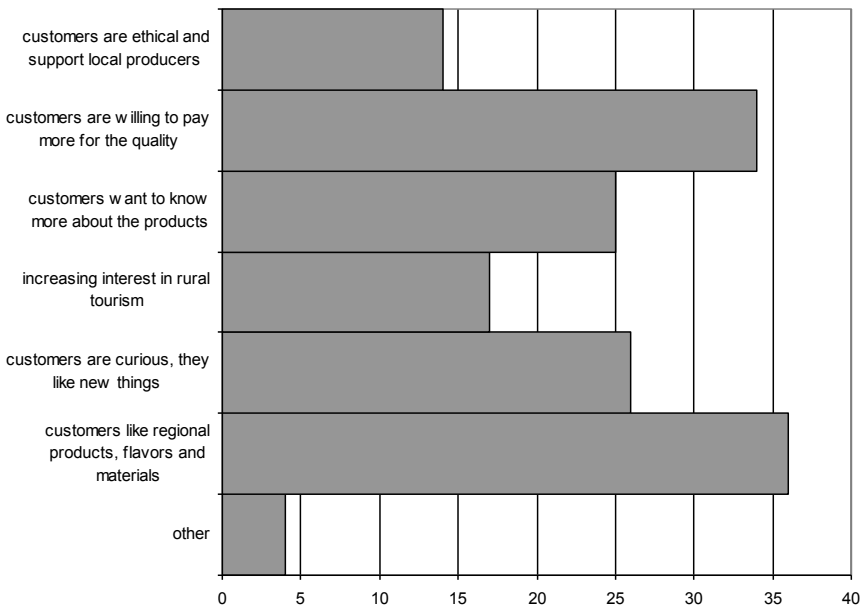
Source: questionnaire survey.

In the view of their producers, regional products should be sold mainly in the region of their production (39% of respondents) or anywhere in the country (36%), only 16% of respondents state that regional products should be available in the main tourist attractions throughout the whole country and only 10% think they should be exported. The answers to this

question demonstrate that regional products are perceived as something very tightly connected to the region of their production and should not be used as a tourist attraction elsewhere.

When asked about the business and its viability, 79% of respondents stated that they are fairly successful in their enterprise and that their products are competitive, while 21% of respondents reported economic difficulties for their businesses. Questions about the reasons for the perceived success of regional products among customers reveal that producers mostly think that customers and tourists like regional products, regional flavours and traditional materials (55%). Half of the respondents (52%) also admit that customers are willing to pay higher prices for the quality products they obtain and 39% of respondents state that customers' curiosity and search for something new is the most important factor in the success of regional brands. Similarly Vieira and Figueiredo (2010) reported both the increasing hedonism of consumers, and idealization of the "rural as more pure, authentic and wholesome space" (Figueiredo, 2003, quoted in Vieira & Figueiredo, 2010: 1649). Last but not least, 38% of respondents mention a desire to gather more information about the purchased products (figure 7).

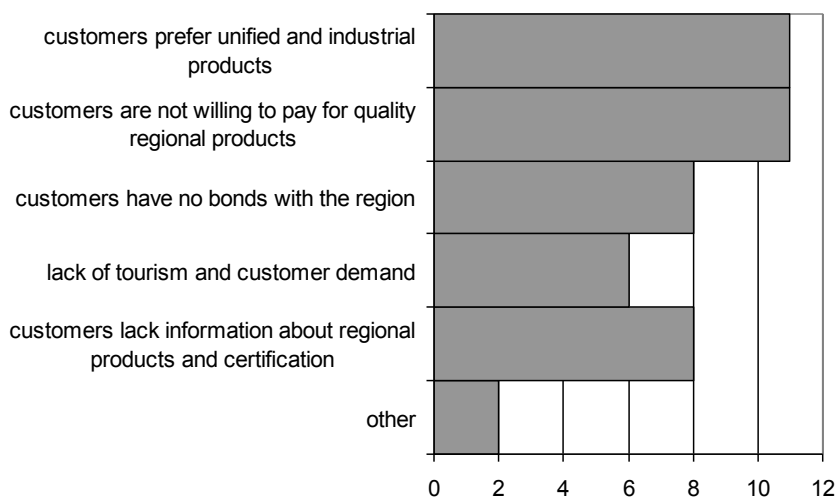
Figure 7 – Main reasons of success of regional products - if the producers felt successful with their products, they were asked to mention the key factors behind their success from their point of view



Source: questionnaire survey.

Those respondents reporting problems were also asked about the perceived causes of their failure in enterprise with the regional brand. Those respondents who declared some kind of economic hardship or perceived lack of competitiveness of their products, however, claim that in the context of the current economic situation customers are not willing to pay for high quality regional products and prefer standardized products from industrial production (both 61%). According to 44% of the respondents, regional products may fail because the majority of the customers have no link with the respective area so they do not feel obliged to buy regional products. The general lack of information about regional branding itself or the purpose of certification is cited as a reason of failure by another 44% of respondents. There are, however, other serious issues, this time on the side of the company, which may complicate the enterprising with regional brands. Some respondents mentioned that their enterprise is too small to be competitive, or that they lack quality raw materials for their production. One of the often mentioned reasons was also the fact that they work alone and are solely responsible for the whole production, so the income is not sufficient for the whole family etc. (similarly Vieira & Figueiredo, 2010). 63% of the respondents stated that they have some problems with financing their company and finding the right financial sources, but on the contrary 55% of respondents have no serious problems with finding quality employees for their businesses.

Figure 8 – Main reasons of rejection of regional products - if the producers perceived themselves as unsuccessful, they were asked to mention the key factors behind their failure from their point of view



Source: questionnaire survey.

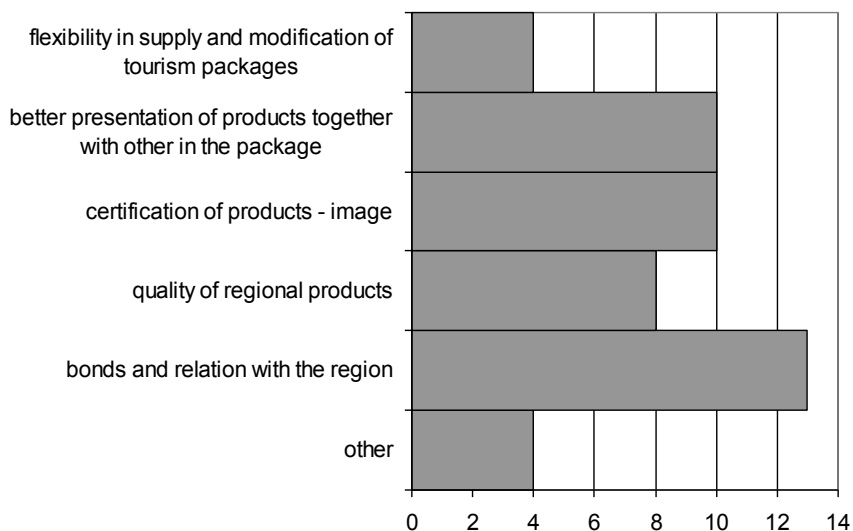
The questionnaire then turned to questions related to the possibility of the creation of links between regional branded products and tourism in rural regions. First, the respondents were asked if they would like to take part in some kind of regional tourism association or cooperative. Half of the respondents (52%) declared some interest in cooperating in an association focused on cultural heritage tourism, one third (33%) felt interested in associations related with eco-tourism, and 28% would like to take part in gastro-tourism activities. Interest in the area of adrenaline tourism was rather low - only 4% of the respondents. Therefore, it is obvious that the certified producers and service providers in the country emphasize the peaceful and relaxing aspect of rural tourism, the authenticity of products and the tradition of hospitality. Hedonistic motivations for gastro-tourism therefore form a certain opposition to adrenaline adventures aimed at a specific market niche or to the mass touristification taking part in some traditional tourist areas (historical cities, spas, ski resorts etc.).

One of the most important questions in the survey aimed to reveal the potential for the creation of complex rural tourism packages. In this aspect, 24% of surveyed producers already take part in some kind of tourism packages, 27% are not interested in such activity. Interestingly, 48% are not yet supplying a tourism package but would like to do so in the future. The potential for fruitful liaisons between regional products and rural tourism is therefore considerable and still underexploited. Half of the respondents stated that they had definite ideas about the creation of a new rural tourism package that included their products or services.

Those respondents who already cooperate in some kind of rural tourism package see their biggest advantages in creating relation and stronger bonds with the region itself (62%) and also highlight the importance of certification for a better image of the products or the packages (48%). 48% of respondents also say that the presentation of regional products within a tourism package leads to better results than if the product is promoted alone.

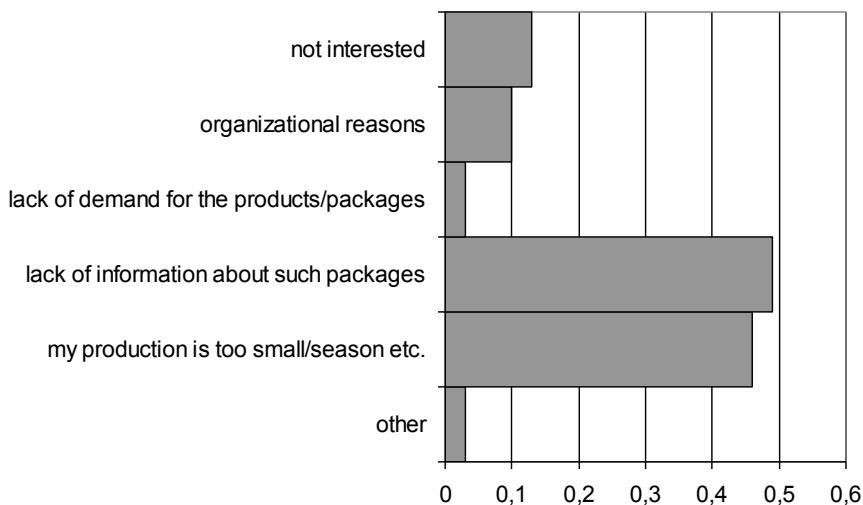
The group of respondents who expressed no interest in becoming part of a tourism package mostly quoted a lack of information about the possibilities in tourism or a lack of opportunities to form a tourism package in their region (49%). As stated earlier in the paper, many of the producers claimed that their production is too small or explicitly seasonal to be able to supply goods for a tourism package (48%). This question, however, uncovered a serious misinterpretation of the essence of tourism packages, lack of information about possible cooperation on such packages and ineffective promotion of tourism packages on the part of regional tourism authorities. This area thus offers enormous scope for improvement which could help the producers and the region itself to foster sustainable rural tourism involving authentic local products.

Figure 9 – Main benefits of tourism packages - producers who already cooperated with others in a form of a tourism package revealed the perceived benefits of these complex products



Source: questionnaire survey.

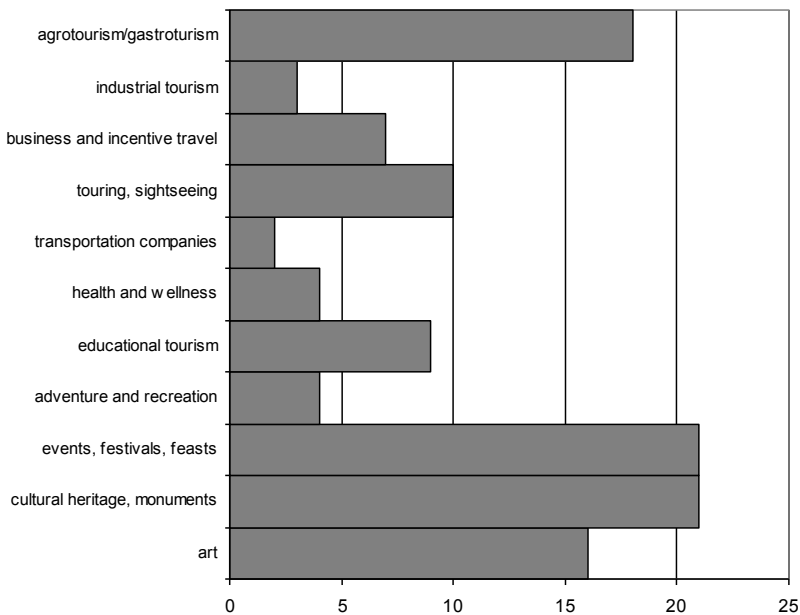
Figure 10 – Main reasons for rejection of tourism packages - producers mentioned the reasons why they were not cooperating with others on a tourism package or similar product



Source: questionnaire survey.

Subsequently, those respondents who expressed an interest in cooperating in tourism packages or said they would like to start their own package revealed their ideas about such packages (figure 11). The biggest interest was evidenced for tourism packages linked with special events, popular festivals and feasts and cultural heritage (both 42%), which is logical given the fact that most of the branded products are artisan products, foods or drinks. Another important area of interest is agro tourism, related to gastro tourism and eco-tourism (36%).

Figure 11 – Areas of potential interest in tourism package creation - producers revealed their ideas about possible realms where they could place their offer to cooperate on a tourism package



Source: questionnaire survey.

The results of the first phase of the research for this paper clearly show that there are several problems which affect the potential creation of efficient liaisons between regional brands and rural tourism. These problems are both on the side of the production, i.e. the supply side: lack of information about tourism packages, problems with marketing and communication of the benefits of certification to the market, problems with the small, often “family”, size of the production, problems with the seasonal nature of production, higher prices of branded products etc., and on the demand side, a lack information and understanding of the meaning of branded pro-

duction on the part of customers, and a lack of appeal in the weak marketing strategies of the regional brands.

Brunori and Rossi (2000) also cited a lack of coherence among the various stakeholders and the inexistence of synergies within rural tourism systems and regional food products, while Vieira and Figueiredo (2010, p. 1655) mention problems like the difficulty of informing the market about the certified products to the market, an absence of dynamism in management entities, a lack of sufficient demand or an absence of enthusiasm on the part of the producers towards the certification processes. In a related survey focusing on the connection of branded products with rural culinary tourism within the context of a transitional post-communist economy, Spilková and Fialová (2012: 19) argue in a similar vein that

(s)mall entrepreneurs and producers do not have sufficient experience and knowledge about the certification schemes or the linkages within the tourism system, mutual mistrust and wariness prevail, entrepreneurs see each other as competitors - all these aspects present a barrier to the development of complex tourism products with value added within this economic and socio-cultural background distorted by forty years under a communist regime.

These problems with the lack of integration and coherence are thus common both for transition economies and also for the countries with developed economies and a strong tradition of rural or agro-tourism.

### **Coordinators' view**

The results of the questionnaire survey revealed some important issues which have to be dealt with quickly in order to establish links between regional producers and improve the performance of the branded products. It is therefore of the highest importance to look at interventions at both levels, fostering liaisons between rural tourism and regional branded products. When it comes to the promotion of the brands and products it is important to mention that according to the association, the brands were primarily aimed at residents and local tourists and inhabitants. This fact may to a certain extent explain their low involvement in tourism packages to date, since their main function was to foster knowledge of the local products and their consumption, as well as the support of the local producers and their recognition by local residents. The marketing channels are mainly: i) the web page of the association showing all the regional brands and listing the certified products with all the information and ii) a printed magazine called *At home in* (the name of the particular region follows) which is in Czech and has been distributed in the tourist information centres of particular regions and at local conferences. There were also two promotional fairs taking place in the historical centre of the capital city of Prague intro-

ducing all the regions and some of the products. However this is still not enough to attract the customers, the majority of whom may not be familiar with the web page of the products, have no access to the magazine, did not know about the fairs taking place in Prague or are from a different region.

So far, there is almost no focus on foreign tourists with the exception of the brochure on regional brands that offers basic information about the certification scheme and brand regions. Penetration among foreign tourists, however, seems to be the second step, after a successful introduction of the regional brands to local tourists and customers. The main problem seems to be primarily in the potential of the Association to run marketing campaigns and look for different promotion channels. The Association is financed from the fees paid regularly by the certified producers and from occasional projects and funding. In fact, it has only two stable employees in the headquarters. The largest part of the certification process is run at the regional level by regional coordinators. The main role of the association and its coordinators here is to decide who gets certification and to ensure that the producers use the brand properly. What is more, how the co-ordination is carried out varies between the regions. There are regions which have common producer meetings to provide training and inform about brand use and there are regions without such supporting activities. To sum up, there is no department or professionals focus purely on marketing issues. For many of the small producers, even having the space to advertise their products on a web page is a big help, but there is no capacity for large marketing campaigns.

Another obstacle clearly resulting from the interview is the existence of many parallel certification schemes on a very similar basis. As mentioned earlier, the Ministry of Agriculture runs the Regional Food brand and the Klasa quality brand. The difference is that these schemes are organized on a top-down principle from the institutions of the state, whereas the Regional brands are mainly bottom-up initiatives stemming from the activity and willingness to promote local products in particular regions. The will to cooperate between these two streams is nonexistent.

The will or even the potential to cooperate lies at the root of the second issue as well. As mentioned earlier, there is an interesting potential represented by producers who would like to contribute to a complex tourism package and get involved in the tourism industry with their products, however, this potential is unexploited mainly due to a lack of knowledge and experience or to mutual distrust between different parties. The need for strong links and a reliable agent is thus even more obvious. However, the Association's director mentioned an important fact that the regional coordinators themselves have agreed on the role of the Association which is to control the level of quality of brands and not intervene in the function of particular regional brands. Thus it seems that the regions in particular need some help and guidance, but although longing for independence, they refuse to ask for it from the headquarters.



Capacity limitations are also among the causes of failure in this issue. The majority of regional coordinators work as leaders of the local action groups (LAG) within the activities in the LEADER projects of the European Union, therefore operating as project leaders of more separate programs. Often, they perceive the whole certification process as a project, a short or medium term task to be carried out – to obtain the brand for their region and have a printed brochure about the regional brand ready for distribution in tourist information centres. There is no longer perspective or development of either the further use of the brand or the creation of links between individual producers to create a complex tourism product. There were some cases of short term cooperation between producers within a regional brand, but these often end with the end of the project. It is possible that after the end of the LEADER program, the established LAGs will have to look for other functions to offer to their region. Regional brands and rural tourism could be one of these tasks. Nevertheless, even the Association's director feels that this impetus has to come from the top, thus maybe the Association itself.

Human capital thus seems to be the key factor in the successful development of any of the bottom-up projects. Enthusiasm is needed not only at the beginning of the application for regional brand status, but also after this goal is reached. The producers have to be willing to cooperate and there must be an inner dynamism to foster further cooperation and build fertile links in rural tourism. Certain economic and entrepreneurial skills and vision are necessary qualities for further development. Regrettably, a lack of coherence, dynamism and enthusiasm are among the most frequently cited barriers to the further creation of links elsewhere (Vieira & Figueiredo, 2010).

The most successful brand – Šumava – enjoyed a set of favourable conditions with positive and dynamic entrepreneurs and leaders, a well chosen coordinating agency familiar also with the tourism industry, quality endogenous resources and human capital united with the support of a three-year cross border project. This provided a guarantee of funding so it has been possible to fully invest the money from the certification fees into promotion. All of these conditions worked together in the right time and place. The Šumava regional brand has been also the first to certificate service providers with the regional brand, starting from small family pensions and restaurants to larger hotels and accommodation facilities.

If it is assumed that the only cooperation to date between producers of certified goods has been selling their goods in a regional shop, often owned and run by one of the producers, the solution could be to start with the service providers. They could develop contacts for the producers and add their accommodation offer to the range. This condition – the use of local products and supplies in the providing of services – has recently been introduced into the certification rules, but there are many obstacles in the way of adhering to these conditions. Service providers argue that many of

the branded products do not meet the EU hygiene and packing requirements for restaurant kitchens. Last, but not the least, the entrepreneurs who have been awarded regional brand certification often perceive themselves as competitors and this may also limit the scope for wider cooperation.

## **Conclusions**

The results of this paper confirmed a relatively good image of the regional branding system and its growing importance. Regional branding is considered an effective tool to promote and improve the image of regional products and whole regions as well as to promote mutual cooperation between different actors in the region aiming to attract tourists and customers. However, there are still some opportunities, as well as threats, that have to be met – mainly in the area of distribution channels, marketing tools and coordination of financial support for the regional branding schemes.

The main conclusions of the paper are twofold. The obstacles to the creation of fertile links are of “informational” character: i) weak promotion of the regional products and lack of knowledge and interest among consumers, who do not recognize the value added of the local production and regional brand, and ii) relatively wasted potential among certified producers and service providers who often do not have enough information or experience to launch a tourism product or package on their own.

Despite the fact that the regional brands originated in a bottom-up process, they are not able to develop further without external help or support from the “up” agents – the Association of Regional Brands, the state agencies or, in the best cases, with their cooperation. A concise and clearly led strategy aimed at the creation of complex tourism products in rural areas is needed. The present funding schemes and campaigns should not just support individual producers and products but should also foster cooperation and activities leading to the creation of complex tourism products.

The key intervention and change, however, has to be in the minds of the local producers, who have to think of cooperation as a beneficial entrepreneurial activity which will bring advantages to both sides. The whole entrepreneurial environment has to shift into a relational space with more confidence, trust and enthusiasm. This, however, seems to be the biggest problem in post-communist countries which are seeking to regain this entrepreneurial environment after many years of distorted business relations and conditions in services and production.

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## About the Authors

**Giovanni Belletti**, PhD and associate professor in Agricultural Economics at the Department of Economics of the University of Firenze, Italy. He took part in many national and international research projects. The main research fields are economics and organisation of agriculture and agro-food system with a specific focus on quality issues, rural development and multifunctionality of agriculture, agricultural diversification with specific focus to rural tourism and agro-tourism.

**Giaime Berti**, Phd in Agriculture Economics, is an expert of rural development policies. He is consultant for the Regional Administration of Tuscany for Rural Development, Italy.

**Gianluca Brunori**, is professor at Pisa University, Department of Agriculture, Food and Environment, Italy. His research activities focus on rural development strategies and on marketing of local food. He is vice-president of the European Society for Rural Development (ERSR). He has been involved in several international projects on agricultural innovation networks, multifunctionality of agriculture, impact of rural development policies, marketing strategies of family farming.

**Berit Brandth**, is professor of sociology at the Department of Sociology and Political Science, Norwegian University of Science and Technology and the Centre for Rural Research in Trondheim. Her research focuses on masculinity and femininity in agriculture and forestry-based work. Her research topics also include gender, work, and care politics with special emphasis on fathers and parental leave. Among her publications are: *Doing Farm Tourism: The Intertwining Practices of Gender and Work*, SIGNS (2010) and 'Farm tourism and dilemmas of commercial activity in the home', *Hospitality & Society* (2012), both co-authored with M.S. Haugen.

**Luis Camarero**, PhD in Sociology and Professor at Universidad Nacional de Educación a Distancia, Madrid, Spain. His recent papers include: *The rural population of Spain* (2009, Barcelona, La Caixa) and with Rosario Sampeiro and Jesus Oliva: *Foreigners, Neighbours, Immigrants* (in Hedberg and Carmo, eds, 2010, *Translocal Ruralism*, London, Springer).

**Daniela Craveiro**, has a Master in Social Psychology from the University of Coimbra (Portugal). Since 2008, she has collaborated in various projects on subjects related with Psychology, Sociology and Education in several Portuguese social research units. She worked as a research assistant at the REHMINE project.

**Maria Dimopoulou**, is an agronomist (Department of Agricultural Economics and Development, Agricultural University of Athens, Greece) and has obtained an MSc degree on Environmental Policy & Management from the Dept. of Environmental Studies, University of Aegean, Greece.

**Idalina Dias-Sardinha**, has a PhD in Sustainability Management of Organizations from the University of Amsterdam (Netherlands), a Master in Environmental Engineering from the Polytechnic School of Lausanne (Switzerland), and a B.Sc. in Geology from the University of Lisbon. She is currently a senior researcher at SOCIUS, Portugal, and coordinator of the REHMINE project.

**Dana Fialová**, is one of the country's most recognized specialists in geography of tourism specializing on the issues of second homes and rural tourism. She works as an assistant professor of Human Geography at the Department of Social Geography and Regional Development, Charles University, Prague and lectures at Business University in Prague, Czech Republic.

**Elisabete Figueiredo**, is a sociologist and PhD in Environmental Sciences, she is assistant professor at the Department of Social, Political and Territorial Sciences, University of Aveiro, Portugal. She is a researcher at GOVCOPP (Research Unit on Governance, Competitiveness and Public Policies). She has been involved in several national and EU funded research projects. Currently she coordinates the project *Rural Matters – Meanings of the Rural in Portugal: between social representations, consumptions and development strategies*. Recently she co-edited (with Luís Silva) the book *Shaping Rural Areas in Europe – Perceptions and Outcomes on the Present and the Future*, (London, Springer, 2013). She is the President of Portuguese Society for Rural Studies (SPER).

**Isabella Gidarakou**, is ex-Professor in the Department of Agricultural Economics and Development, Agricultural University of Athens, Greece. Her

research focuses on agricultural structures & farming systems, employment and gender relations in the rural space and agritourism.

**Marit S. Haugen**, has a doctorate in sociology from the Norwegian University of Science and Technology. She is research manager at the Centre for Rural Research in Trondheim, Norway. Her research focuses on gender issues in agriculture and rural communities, work and life quality, work and gender identity, images of the rural, and rural tourism. Her publications within the field of tourism research include: 'Farmers as entrepreneurs: The case of farm-based tourism', *Int. J. Entrepreneurship and Small Business* (2008), co-authored with Jostein Vik, and 'Visitors to farm based tourist enterprises in Norway', *Scandinavian Journal of Hospitality and Tourism* (2010), with A. Blekesaune and B. Brandth.

**Elisabeth Kastenholz**, is associate professor at the Department of Management, Economics and Industrial Engineering, University of Aveiro and researcher at the GOVCOPP (Research Unit on Governance, Competitiveness and Public Policies), and currently coordinates the master program of Tourism Management and Planning at the University of Aveiro. She holds a degree in Tourism Management and Planning, a MBA and a PhD in Tourism. She coordinates the project *ORTE – The Overall Rural Tourism Experience and sustainable local community development*. She has various papers published in refereed journals and books, mainly about rural tourism and tourism marketing.

**Maria Kokkali**, is agronomist (Department of Agricultural Economics and Development, Agricultural University of Athens, Greece) and has obtained an MSc degree on Integrated Rural Development from the Dept of Agricultural Economics and Rural Development, Agricultural University of Athens, Greece.

**Alex Koutsouris**, is Assistant Professor in the Department of Agricultural Economics and Rural Development, Agricultural University of Athens, Greece. His research interests revolve around sustainable rural development focusing on extension and communication, training and education and agritourism with emphasis on systemic and participatory approaches.

**Britt Kramvig**, is trained as a multidisciplinary ethnographic researcher and holds a PhD from the Department of Planning and Community studies at the University in Tromsø, Norway. She is inspired by music, lyrics, art and films besides reading into postcolonial, phenomenological and feminist studies. Her life as well as work is rooted in the Arctic region; from where different texts and films entering the existential and everyday challenges of live emerge. Publications include "The Future can on-



ly be Imagined" – Innovation in Farm Tourism from a Phenomenological Perspective', *The Open Social Science Journal* (2010), co-authored with B. Brandth and M.S. Haugen.

**Joana Lima**, is an Economist and a PhD Student in Tourism, at the University of Aveiro, focusing on social tourism. Currently she is lecturer and research assistant at the Department of Economics, Management and Industrial Engineering, University of Aveiro. She is a researcher at GOVCOPP (Research Unit on Governance, Competitiveness and Public Policies). Her main research areas of interests are in tourism socio-economic impacts, social and economic development, social tourism and the tourism experience.

**Andrea Marescotti**, PhD and Associate Professor of Agri-food Economics and Policy at the University of Florence, Italy. He has a degree in agricultural economics and policy from the University of Pisa. Since 1991 he has been involved in many international and national academic research activities on food quality and geographical indications, supply-chain analysis, and rural development. Main research interests range between theoretical and empirical studies on farmers' marketing strategies; coordination mechanisms between firms in agribusiness; socio-economic analysis and evaluation of geographical indications protection; short supply-chains analysis; quality standards and globalisation.

**Eva Meiberger**, in 1996 she retired from education service and a year later she enrolled in Paris Lodron University, Salzburg, Austria. Soon after, she was elected as a student representative (Studienrichtungsvertreter). She finished her studies of Political Sciences and Sociology in 2002 and graduated as PhD in 2005 with a thesis on agricultural enterprises with diversification and the social changes in this field. She is an associate fellow of the University of Salzburg, Division of Political Sciences & Sociology, Division of Sociology and Cultural Science. She is the Chairlady of the Association of Cultural Sociology on the University of Salzburg, Austria.

**Sérgio Milheiras**, has a Master of Environmental Policy from the University of Cambridge (UK) and a B.Sc. in Environmental Biology from the University of Lisbon (Portugal). Before joining the REHMINE project, where he is a research assistant, he worked with different private and public sector organizations, either at national or European level.

**Jesus Oliva**, is PhD in Sociology and associate professor with tenure at Universidad Pública de Navarra, Spain. His last papers include 'Rural Melting-Pots, Mobilities and Fragilities' (*Sociologia Ruralis*, 2010).

**Antonio Raschi**, is an agronomist working since 1982 at Institute of Biometeorology of the National Research Council (CNR – IBIMET), Florence, Italy. His main research interests have been dealing with the impact of global change on ecosystems, and with rural development. He has been involved in several EU and National projects as well as COST actions. In the period 2005-2010 he has been the coordinator of the CNR project on rural development. He is currently the Director of IBIMET-CNR. He is author or co-author of about 100 papers published in refereed journals and book.

**Patrícia Rêgo**, has a Sc. Degree and a PhD in Geography. She's an assistant professor at the University of Évora (Portugal) – Department of Geociencias. She has participated in a variety of research projects and has published numerous articles on rural development and social-territorial innovation.

**Massimo Rovai**, is an associate professor at the Department of Agriculture, Food and Environment, University of Pisa, Italy. Main research interest range between environmental evaluation, rural development policies, agri-environmental policies, multifunctional agriculture, rural landscape planning

**Martin Rønningen**, is associate professor at Lillehammer University College, Norway. Rønningen's research has involved subjects as new forms of co-operation, destination development, destination image, holiday motivation, travel behavior and innovation in the tourism industry and the service industry in general. He is the Director of Centre for Innovation in Services at Lillehammer University College.

**Jana Spilková**, received her PhD in social geography in 2006 from the Charles University in Prague and is an assistant professor of Human Geography at the Department of Social Geography and Regional Development, Charles University, Prague, Czech Republic. Her research interests include geography of retailing and consumption, focusing on the alternative food networks and sustainable lifestyles.

**Martin Weichbold**, studied Sociology, Political Science and Psychology at Paris Lodron University, Salzburg, Austria. After reaching his Master and Doctoral degree in Sociology he focussed his research in methodology. In 2005 he finished his habilitation publishing a book about Touchscreen-Interviewing. Since then he is professor for sociology and methodology at Paris Lodron University Salzburg. Besides methodology, his main fields of research are sociology of art and rural sociology. He was Head of the Department of Political Science and Sociology from 2007-2011 and he is currently Vice Dean of the Faculty of Cultural and Social Sciences.



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