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**SCHOOL OF MANAGEMENT STUDIES FOR
THE SERVICE SECTOR**

**Attitudes of Residents Towards
Tourism in Madeira**

By

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**A thesis submitted in fulfilment of the requirements for the award of
PhD degree.**

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To my wife Isabel,
My daughter Luisa and
My son João Pedro

ABSTRACT

This study investigates the attitudes of residents towards the social impacts and consequences of tourism on Madeira island. Appropriate literature review was made upon Madeira background information, tourism impacts, attitudes and tourism and policy and tourism. The attitudes of residents were measured and assessed to explain the underlying dimensions of residents' tourism attitudes.

After a pilot study of 478 residents in June 1996 further data was collected in 1999 from 397 residents of Funchal. A survey instrument questionnaire was used to collect data in face to face interviews.

Overall residents of Madeira recognised the importance of tourism as a development option. Additional analysis examined residents' knowledge about tourism and its economic importance. The findings suggested that it is not possible to determine residents' attitudes towards tourism impacts and its consequences according to their accurate or inaccurate knowledge about the importance of tourism. Demographic variables were selected to examine their influence on attitudes of residents towards tourism. Findings suggested the demographic variables gender, having a business related to tourism, education in tourism, working in tourism, contact with tourists, family related to tourism, age, education level and occupational status were not determinants of residents' attitudes towards tourism in general. In order to explore the views of residents' towards the development of tourism policy and their pressure on the government, it was considered to what extent residents support tourism development. The findings suggested that it is not possible to determine the residents' support for the development of tourism according to their attitudes.

Overall results from this study suggested residents' attitudes towards the social impacts and consequences of tourism should be considered in strategic planning and policy because they influence the environment for tourism development. Furthermore the research takes into account that residents are members of the community, citizens

affected by policy and partners of tourism development, emphasising the importance of values and ideologies as clusters of values influencing policies and institutions. This study advocates an holistic approach as a matrix for developing stakeholder tourism, as a challenge for the partners evolved: residents, tourists, private and public sectors.

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CHAPTER 1

INTRODUCTION AND OBJECTIVES

1.1 Introduction

This research is a study of the attitudes of residents of Madeira towards the impacts and consequences of tourism and their views on tourism policy. The research seeks to:

- a) Examine the tourism attitudes of residents of Madeira;
- b) Identify the factors that influence their attitudes; and
- c) Explore their views about tourism development policy.

To complete this examination of the topic, residents' attitudes are quantified and factors are developed to explain their behaviour towards tourism in general. This study contributes to the existing body of knowledge about the importance of residents' attitudes to tourism by examining the topic and its implications for tourism policy.

The origins of the attitudes to tourism and its dimensions as a scientific object emerged both from existing literature and types of measurement. Hypothesised constructs will be measured and studied in order to find underlying dimensions. The four hypothesised areas or nominated constructs for this research are:

- attitudes to tourists;
- attitudes to the tourism industry;
- attitudes to economic impacts of tourism;
- attitudes to future actions related to tourism.

The survey instrument - questionnaire, was used to collect information required to answer the research questions and fulfil the objectives of the study. Data was analysed using descriptive and comparative statistics and factor analysis.

1.2 Background of the Study

This research is part of the theoretical and empirical debate about residents' attitudes towards tourism. The literature review of residents' attitudes in general and towards tourism in particular, includes relevant approaches to the subject such as Davies et. al., (1988); Ryan and Montgomery (1994); Lindberg and Johnson (1997); Ryan et. al., (1998). The studies by Davies, Ryan and Montgomery, Lindberg and Johnson provide the contextual, referential and polemical framework. The questionnaire used in this study is a revised version of that developed by Davis et. al., (1988) to assess and segment local residents with respect to their attitudes, interests and opinions about tourism. Ryan and Montgomery (1994) modified the questionnaire developed by Davis et. al., (1998) in their attempt to identify and categorise the attitudes of residents towards tourism, and to explore the stability of those attitudes in the selected town of Bakewell in the UK. More recently Ryan et. al., (1998) adopted the same questionnaire of Davis et. al., (1988) to compare the attitudes of residents towards tourism development in two different areas and in different stages of the destination life cycle. The first area of Bakewell in the UK, was considered in terms of Butler's (1980) life cycle theory as a mature rural destination. The second area of Ragitikei in New Zealand, is equally rural, but is considered at the late involvement stage of its life-cycle. Ryan et. al., (1998) argue that as predicted by Doxey's theory of irridex (1975), the attitudes of residents towards tourism in an area which is in the late involvement stage are more favourable to tourism than resident attitudes in mature destinations. Ryan et. al., (1998) found that socio-demographic variables were not determinants of attitudes towards tourism in an area. As a consequence the authors suggest that the attitudes are filtered through a value system. They argue that in the initial stages of tourism development core values are not used to evaluate its impacts. However, they suggest that as tourism develops into a mature stage more important values are considered more strongly. The work of Lindberg and Johnson (1997) emphasises the importance of value systems, and argues that socio-economic variables do not directly contribute to attitudes towards tourism. In effect, Lindberg and Johnson (1997) introduced a conceptual model for predicting attitudes where the data support the hypothesis that demographic variables affect attitudes indirectly through values.

This study examines the relationship between attitudes and values as well as to what extent the ideologies as clusters of values are applicable to Madeira, a mature destination. In so doing this research looks at the importance of residents in a dynamic civic society approach. Thus, the importance of tourism is considered from a stakeholder perspective that may influence the future of tourism within the framework of a cosmopolitan age and knowledge society.

1.3 The Structure of the Thesis

This thesis is structured into eight chapters. Chapter 1 gives an introduction to the research. Epistemological issues on tourism are discussed. Chapter 2 provides background information about Madeira, the location of this research. Chapter 3 reviews the literature on socio-cultural impacts of tourism. Considerations of tourism on islands are debated. Chapter 4 explores the attitudes of residents towards the social impacts and consequences of tourism and its importance for developing stakeholder tourism. Chapter 5 focuses on the importance of tourism policy for tourism development. Chapter 6 outlines the methodological procedures of this study on residents' attitudes towards tourism. Research objectives, questions and hypotheses are stated. Chapter 7 describes the data analysis and findings. Lastly, Chapter 8 discusses the findings of the study and develops conclusions about the attitudes of residents towards the social impacts and consequences of tourism and its implications.

1.4 Epistemological Issues of Tourism

Tourism is a complex and multifaceted phenomenon crossing many disciplines (Echtner and Jamal, 1997) which means that researchers 'Tend to approach tourism studies from within the specific boundaries of the main disciplines in which they have been trained' (Echtner and Jamal, 1997, p.868). Tourism theory, at the present is thus fragmented, lacking co-ordination, integration and a holistic approach.

The study of the tourism phenomenon is relatively new at the academic institution. 'Samuel Pegge reported the use of 'tour-ist' as a new word for traveller c. 1800; England's Sporting Magazine introduced the word tourism in 1811' (Smith, 1989, p.17). The study of tourism progressed during the 20th century and is nowadays associated within a diverse range of disciplines. Jafari and Ritchie (1981) refer some of the disciplines, which may be useful to the study of tourism: economics,

sociology, psychology, geography and anthropology. Later a study of Jafari and Aaser (1988) stresses 15 disciplines included in 157 titles of doctoral dissertations with tourism focus, written between 1951-1987. Following Echtner and Jamal (1997) a survey of North American tourism and hospitality researchers showed that journals from a huge variety of disciplines were referenced by and published by these researchers. These disciplines were economics, business studies, marketing, psychology, anthropology, and geography. Despite the amount of disciplines impacting on tourism, Pearce (quoted in Echtner and Jamal, 1997, p.869) considers that 'it appears that tourism educators often assume that there are core principles, facts, and methods to deliver to students. This is an uncomfortable assumption in a new study area like tourism. Pearce suggests that pre-paradigmatic study areas, such as tourism, should have a greater tolerance for eclectic and diverse approaches to investigation. Yet, many tourism researchers seem unwilling to reach across disciplinary and methodological boundaries'. Having in mind these complexities, Echtner and Jamal (1997) put the question how should one examine the study of tourism? They contend (1997) one way could be stressing the area of tourism studies in relation to some disciplinary problems.

There is great discussion among tourism academics concerning methodological aspects, research orientations and the most appropriate approaches to tourism studies (Dann, Nash and Pearce 1988; Jafari 1989; Ritchie and Goeldner 1994; Smith 1989 ; Witt, Brooke and Buckley 1991). According to Echtner and Jamal (1997, p.869): 'These discussions also reveal that tourism scholars are divided in their opinions as to whether tourism should be studied as a distinct discipline or as an area of specialisation within existing disciplines'. Some authors advocate a distinct and independent science of tourism, some thing like a 'tourismology'. Other academics, on the other hand, despite the lack of integrated framework and concept in tourism, have been unwilling to argue for tourism as a distinct discipline (Dan, Nash and Pearce 1988; Witt, Brooke and Buckley 1991). Instead, they highlight the requirement for bigger crossdisciplinary research to bypass conceptual and methodological problems. Dann, Nash and Pearce (1988, p.2) suggest that 'The field of tourism was discovered by social scientists in the early 1970, and has become a legitimate area of systematic investigation. Whether it will require new conceptual approaches and methodologies is still largely debatable'.

Witt, Brooke and Buckley (1991) maintain it is unrealistic to expect tourism to have 'a single theoretical underpinning' and contend that its research will continue 'dynamic, variegated and at times internally conflictual' (Witt, et. al., 1991, p.164; Echtner and Jamal, 1997). Jafari (1992) suggests the research should take into account existing disciplines but recommends that tourism should develop within a cross disciplinary 'Knowledge-based platform' based on a scientific foundation and maintaining bridges with other platforms. Jafari's insights on the importance and structure of tourism is an attempt to model tourism from a more holistic approach. To quote Etchner and Jamal (1997, p.871): 'The debate concerning the disciplinary development of tourism is unlikely to be resolved in the near future, for the evolution of tourism studies as a distinct discipline faces significant challenges. Some further insight into these challenges may be provided by first examining the intradisciplinary conflicts prevalent within each of the diverse disciplines currently housing tourism studies and then moving on to explore the interdisciplinary issues arising among these various disciplines'.

1.4.1 Intradisciplinary Perspectives

The growth of the tourism industry after the Second World War was accompanied by a parallel development in academic studies and a concern with the consequences of tourism impacts. However the maturity of tourism as a research topic emerged, to quote Grabun and Jafari (1991, p.4): 'when researchers set out to specifically study tourism and when it emerged as a prime focus for discussion and scholarly meetings in the 1970s'. In this context several disciplines marked what aspects of tourism will be studied. Such interdisciplinary focus causes epistemological obstacles for the development of a more holistic approach of tourism. Moreover, Echtner and Jamal (1997), point out that also researchers and educators have to contend with the philosophical and methodological debates existing within various disciplines. Some examples will follow.

Sociology and Social Psychology

The sociology of tourism is considered, (Dann and Cohen, 1991), an ongoing enterprise. Since there is no universally accepted sociological approach, as a consequence there can be no one single sociology of tourism. Several schools advocate positivist, quantitative methods and procedures or hermeneutic,

qualitative approaches such as formalism, etnomethodology and phenomenology. Moreover once there is no single sociology of tourism, Dann and Cohen (1991) summarise three positions from the researchers, which should help to clarify matters. There are researchers who argue that the 'sociology of tourism' should be located within the sociology of migration. Other researchers maintain that 'sociology of tourism' should be contextualised within the sociology of leisure and another group stress the travel dimension of tourism. Moreover the fact that Cohen has pioneered some typologies of the tourist, Dann and Cohen (1991, p.158) consider 'Such typologies are still only heuristic rather than explanatory tools (which) denotes that the sociology of tourism, lacking powerful theoretical and analytical equipment, is still very much in its infancy'. Cohen (1989) maintains that sociological research on tourism focus into four principal issues areas: the tourist, relations between tourists and locals, the structure of the tourism system and the consequences of tourism. Furthermore, Cohen (1984) considered the impact of tourism the most researched within the sociology of tourism, mainly focusing on the host community or society. On the other hand, Cohen (1988) points out MacCannel as the first sociologist to include the study of tourism within the mainstream of a sociological theory, by inserting his analysis to the work of Marx, Durkheim and Levi-Strauss in an attempt to develop an 'ethnography of modernity' (MacCannel,1996, p.1). In addition to MacCannel's (1976) seminal book, Cohen (1988) states other traditions in the qualitative sociology of tourism like Boorstin and Turner, emphasising Urry (1990). On the other hand the fact that Giddens (1997) does not discuss tourism, per se, his discourse provides interesting insights which could be relevant for the interdisciplinary dilemmas of tourism. Giddens prospects (1997) can be summarised as follows:

- There are a diversity of theoretical approaches in sociology and other social sciences. Theoretical disputes are complex and difficult to resolve;
- The main theoretical approaches in sociology are functionalism, structuralism, symbolic interactionism and Marxism;
- One great theoretical dilemma in sociology is how we should relate human action and social structure;

- A second dilemma is whether societies should be seen harmonious and orderly or whether they should be considered as having permanent conflict;
- There is room here for consensus, conflict, ideology and power;
- A third dilemma is how we should deal with issues of gender in sociological analysis;
- A fourth focus is the analysis of modern social development. Are processes of change mainly shaped by capitalism or by other factors, including non-economic ones? From this debate there are consequences for development models and attitudes;
- Weber's thesis about the relevance of Puritanism on economic development is an example in what makes a theory valuable.

The main debate in social psychology has been controlled, experimental methodologies versus less regulated cultural setting for surveys, fieldwork and other studies have been achieved (Echtner and Jamal, 1997). Moreover and to quote the same authors (1997, p.872): 'As growing human populations and increasing global tourism impact on natural and cultural resources, it will become increasingly important to understand and to manage the leisure experience and its use of these resources'. This gives evidence and field for social psychology and other sciences.

Geography

Geography focuses on location, the where of the tourism phenomenon. In addition, there are important contributions on environmental, regional, spatial and evolutionary aspects of tourism (Mitchell and Murphy, 1991). The same authors contend there is a need for an integrative system model beyond the current divisions of area development models, project development models and management marketing models. As a complement they suggest (1991) a community planning paradigm after stressing the importance of a conceptual framework of tourism and its impacts and the concept of carrying capacity. Furthermore the debate on humanistic geography favouring qualitative methods, versus objective, quantitative ones favoured by physical geography, continues with

the addition of radical geography (Echtner and Jamal, 1997) with consequences for the study of tourism.

Anthropology

An anthropological focus in tourism has been emerged only since the 1970. To quote Nash and Smith (1991, p.13): 'Today, however, the anthropological study of tourism is established and there are hopeful signs for future development in both basic and applied research'. Moreover, despite some overlap with sociology, anthropology sees tourism as a component of human culture being the main focus: 'The forces that generate tourists and tourism, the transactions between cultures or subcultures that are an intrinsic part of all tourism, and the consequences for the cultures and the individuals in them'. (Nash and Smith, 1991, p.22). From a methodological point of view the holistic, qualitative and hermeneutical approach is generating consensus in interpreting human behaviour and sociocultural aspects (Smith, 1997; 1980; Crick, 1989; Selwyn, 1994; Nash and Smith, 1991; Echtner and Jamal 1997). On the other hand a landmark work in the field of the anthropology, with pivotal consequences for the anthropology of tourism and its scientification has been 'Host and Guests: The Anthropology of Tourism' (Smith, 1977). Since then, other developments have taken place. Crick (1989) notes that in many social sciences like economics and geography, we rarely take in consideration the local voice. To quote Crick (1989, p.338): 'Without close attention to the local voice (voices, for tourism produces a range of local reactions), our social scientific work risks being descriptively poor and ethnocentric. We need to know the local perceptions and understandings of tourism, we need to know the local perceptions of change and continuity, and we need to recognise that any culture is likely to have contradictory things to say about both.'

Ecology

Ecology, with several meanings, is a biological study of the relationship of plants and animals to each other and to their environment. Cultural ecology deals with humankind and its environment (Farrel and Runyan 1991). Moreover, Farrel and Runyan (1991, p.27) consider: 'The relationship of tourists, communities, managers, developers, and policymakers to each other, and especially to their environment, is the substance of ecological tourism and, certainly, sustainable

development'. Furthermore, the same authors (1991), emphasised locations where impacts are most relevant like alpine areas, coastlines, islands, lakes and habitat areas, advocating ecotourism and 'more responsible' or sustainable development for 'a better-informed and satisfied society'.

Organisational and Strategy Research

In this area, very close with tourism organisations, conflict can be noted between perspectives such as phenomenology, hermeneutics and ethnography versus positivism; the latter more linked to quantitative approaches (Echtner and Jamel 1997). In the field of strategic research, to quote Echtner and Jamel (1997, pp.873-874): 'Sustainable tourism planning and development requires integrated and holistic approaches to strategy. But effective tourism planning and policy development at various levels (organizational, local, regional, national, and global) tends to be impeded by poor understanding of the complexity of the tourism domain and the merits of diverse methodological approaches to gaining knowledge'. Furthermore they note (1997) that organisations and strategy researchers and managers of tourism need to take into account many inter-correlated factors and they need to understand the differing approaches in their own field and good knowledge of the research and methodologies of other disciplines.

Marketing and Consumer Research

There are tourism services provided by various business and public organisations and the marketing and management of these services are relevant (Calantone and Mazanec 1991).

Economics

Brian Archer, John Fletcher and the Surrey School were pioneers in impact studies and multiplier effects of tourism. Nowadays, economic approaches and cost benefit studies or analysis social of costs - benefits is developing across the world, jointly with econometric models for tourism.

Leisure, Recreation and Tourism

Recreation and leisure fields parallel with tourism. Both fields must strive for academic legitimacy within a framework of a convergence of interests. As Smith

and Godbey (1991, p.96) put it: 'recreation and leisure scholars have something else to share with their tourism colleagues: the ongoing struggle for intellectual rigor and maturity, the striving for academic legitimacy, the self-questioning about the essence and definitions of the field, and the dialectical tug-of-war between professional relevance and curiosity-driven academic research'

History

History has an important contribution for the understanding of tourism. Some authors (Tower and Wall, 1991) emphasised the ancient and medieval worlds, the 'Grand Tour' era and spas and seaside resorts. Meanwhile research into the history of tourism is at an early stage (Towner, 1984). This latter author, studied the 'Grand Tour' from 16th century to circa 1840 based on primary sources and content analysis, covering biographical information, spatial aspects, temporal aspects, cultural tastes of the tourists and aspects of the tourism industry from the journals and guide books: range of accommodation, transport, roles of bankers and diplomats, the impact of tourism on the provision of guides, changes in prices etc (Towner, 1984). Another author (Swinglehurst, 1994) considers that until the Second World War the tourist interaction between visitor and resident went on unnoticed 'there were not enough people involved to make it worthwhile to record the effects of the tourists on the populations of the countries they visited, but a change was taking place which would have its effect later' (Swinglehurst, 1994, pp.96-97). Travelling and discussion about travel were a focus and an aspect of the links between cosmopolitanism and xenophobia during the period of the 'Grand Tour' (Black 1997). The same author (1997) emphasises tourism, at the period at hand, was debated as a means of education and not as a leisure pursuit with a progressive shift towards a leisure activity. Sigaux (1966) advocates that a place of honour in the history of organised tourism, is due to Thomas Cook, for conceiving the idea of linking the railway, the steamship company, and several hotels in 1845. Towner and Wall (1991, p.79) stress some aspects of tourism history research as follows 'Much of the research has been concerned with changes within destinations areas, such as changes in numbers and characteristics of visitors, changes in resident attitudes, and changes in sources of investment and degree of local control. However the evolution of relationships between resorts and their surrounding areas, and the developing tourist travel systems have also been of interest'.

Politics and Political Science

Richter (1983) in an early study considers tourism is the second largest activity of world trade but it is also almost totally ignored by political science. She stresses four objectives:

- to prove the inattention of political science to tourism;
- to indicate the relevance of the tourism phenomenon;
- to demonstrate how tourism germanes to almost every area of political science;
- to suggest research questions of tourism with practical consequences to major subfields .

Edgell (1983) describes the mechanisms of tourism policy-making in the United States, pointing out issues concerning tourism policy and planning and tourism interests within the field of international economic trade policy. Ronkainen (1983) focuses items such as political environmental co-operation, facilitation of travel and security. Moreover Mathews and Richter (1991) advocate that political science addresses the theory and practice of politics, describes and analyses political behaviour and political systems. Furthermore and to quote Mathews and Richter (1991, p.120): 'It has evolved from a normative and descriptive discipline into one which utilizes more behavioristic approaches to the study of political phenomena. Political scientists have engaged in a constant effort to apply their discipline to the study of tourism since the early 1970'. The same authors (1991) highlight issues such as: ideology, political socialisation, power, authority, legitimacy, sovereignty and political development attempting bridges with the tourism sector. In addition Ritcher (1994) explores the political role of gender as it relates to tourism. She stresses (1994, p.154): 'The vast bulk of the financial control of the private tourism sector is in the hands of men. That is almost equally true of the public sector'. The same author (1994) also suggests, as a next step of research, to explore the impact of tourism, taking into account the variable gender.

Archer and Cooper (1994) stress the positive and negative impacts of tourism, including economic, sociocultural, environmental, ecological and political impacts.

They observe that a full understanding of the human impact of tourism upon destinations and residents can be achieved by integration and co-ordination of the work of political scientists with experts in other disciplines and with tourism practitioners. Archer and Cooper (1994) also contend that political scientists can contribute for the body of knowledge of the impact of tourism upon many aspects of human life and organisation can be improved if political scientists study tourism as an independent variable impacting on public administration, comparative politics, political theory, international relations and national politics (also, Richter, 1983). To quote Archer and Cooper (1994, p.80): 'Many of these fields are virgin territory for aspiring young researchers - will they heed the call? Specific work is needed in a variety of areas but particularly welcome would be:

- studies examining the influence of tourism upon the roots of power in communities and the implications for community-based investment and the integration of tourism into the community;
- work examining the stage of destination life cycle at which community involvement is most appropriate, and most vulnerable to external political and commercial decision-taking; and
- further examination of policy impact analysis within a tourism context.'

This discussion on perspectives from different disciplines shows some intradisciplinary conflicts that impact on tourism research and divisions within the research field. According to Echtner and Jamal (1997) there are two major defined camps in tourism studies:

1. The business-enterprise and development camp (concerned with growth and profit);
2. The impacts and externalities camp (concerned with impacts of tourism on host nations, communities and residents);

To quote Echtner and Jamal (1997, p.875): 'Though some attempts have been made, especially with the imperative of sustainable tourism development, researchers within the contributing disciplines have generally tended to examine

tourism from their own fields of reference, based on their specific philosophical and methodological preferences’

1.4.2 Interdisciplinary Perspectives

Following Echtner and Jamal (1997) the above review emphasises some of the methodological, epistemological and philosophical conflicts and dilemmas happening within some of the disciplines ‘housing ‘ tourism studies. These have provoked various discussions and debates in the field of tourism dealing with adequate definitions, methods, models, perspectives and theory development and improvement, stimulating subsequent research. However, complementary to these intradisciplinary problems, the tourism field is also challenged by some potential points of view among the various disciplines. If tourism is to develop and mature as a distinct and autonomous discipline these interdisciplinary conflicts should to some extent be overcome. Two philosophy of science approaches, Kuhn (1970) and Bernstein (1991) can help the development of this issue. Also it should be noted that neither Kuhn nor Bernstein ‘discuss tourism *per se* ‘ despite being useful in giving good insights into the interdisciplinary problems of tourism field. .On the other hand a third perspective, ‘discussing tourism *per se* as a discipline ‘ (or indiscipline)’ will be presented: ‘John Tribe: *The Indiscipline of Tourism* (1997)’

Kuhn's Perspective

The main theoretical work of Kuhn (1970) from where he stimulated much subsequent research is ‘*The Structure of Scientific Revolutions*’. Central to the Kuhnian point of view is the concept of ‘paradigm’. However, Kuhn now, prefers instead, the concept of ‘disciplinary matrix’. To quote Kuhn (1970, p.182): ‘To that question my original text licenses the answer, a paradigm or set of paradigms. But for this use, unlike the one to be discussed below, the term is inappropriate. Scientists themselves would say they share a theory or set of theories and I shall be glad if the term can ultimately be recaptured for this use. As currently used in philosophy of science, however, ‘theory’ connotes a structure a more limited in nature and scope than the one required here until the term can be freed from its current implications, it will avoid confusion to adopt another. For present purposes I suggest ‘disciplinary matrix’; ‘disciplinary’ because it refers to the common possession of the practitioners of a particular discipline; ‘matrix’ because it is

composed of ordered elements of various sorts, each requiring further specification'. However the designation of paradigm will be kept in our focus. Moreover in the case at hand, paradigm, it seems that tourism is in a pre-paradigmatic era. The struggle to define concepts, such as tourism and tourist, and the huge debates about adequate methodology, exemplify the pre-paradigmatic status of tourism (Echtner and Jamal 1997). Furthermore a question continues being relevant: Will tourism converge and develop into a distinct discipline with a firm scientific base?

From the point of view of Kuhn (1970) as far as the philosophy of science is concerned, this needs a distinct paradigm consisting of 'the entire constellation of beliefs, values, techniques, and so on shared by the members of a given community' (Kuhn, 1970, p.175). Currently, tourism is entrenched with various disciplines (Echtner and Jamal, 1997). Each of these areas cover a distinct matrix. To quote Kuhn (1970, p.109): 'paradigms provide scientists not only with a map but also with some of the directions essential for map-making. In learning a paradigm the scientist acquires theory, methods, and standards together, usually in an inextricable mixture. Therefore, shifts in the criteria determining the legitimacy both of problems and of proposed solutions'. For example, research questions, theories, concepts, philosophical approaches and models and techniques guiding geography, psychology, sociology are different from those of economics or mathematics. This provokes incommensurability or difficulties to communicate because of incompatible and conflicting paradigmatic approaches (Echtner and Jamal 1997). As a consequence crossdisciplinary research is difficult. According to Echtner and Jamal (1997, p.876): 'Using Kuhn's philosophy it seems that tourism will remain an area of study within each discipline (such as psychology, geography, anthropology, economics, marketing etc.). Within each of these disciplinary matrixes, tourism will continue to be studied as a specialized research topic'. 'In such circumstances, it will be difficult for tourism to build up its own paradigm, with the correspondent constellations of beliefs, values, techniques, and so on shared by members of a given community' (Kuhn, 1970, p.175). In effect, for Kuhn, science progresses through revolutions, but there is no guarantee that this progress conducts toward 'the truth' (Kuhn, 1970, p.170). The development of a distinct tourism discipline and science will require a Kuhnian scientific revolution

where a group of researchers ‘breaks away from disciplinary boundaries and works to establish a distinct disciplinary matrix for tourism’ (Echtner and Jamal, 1997, p.876). However, following Kuhn, even if this happens, such a new discipline might be influenced by the ‘triumph of one of the pre-paradigm schools, which, because of its own characteristic beliefs and preconceptions, emphasized only some special part of the too sizable and inchoate pool of information’ (Kuhn 1970, p.17). This can occur with tourism, and from a Kuhnian point of view it seems that a distinct discipline of tourism is somewhat unlikely. Tourism is a pre-paradigmatic case, influenced by several and ‘incommensurable’ disciplines or areas of study. To quote Echtner and Jamal (1997, p.877): ‘This is not a very enviable position for an aspiring new discipline’

Bernstein’s Perspective

Kuhn’s background in theoretical physics provides support for the dichotomy between natural versus social sciences. This, epistemological dilemma takes a different approach as regards as Bernstein’s (1983) philosophy of science. Using Bernstein’s perspective the main barrier impeding tourism’s theoretical progress is not due to incommensurability but by an inadequate philosophical and methodological approach (Echtner and Jamal 1997), and it seems that the problem of tourism ‘might be seen to be plagued by the same phobia that dominates all of the social sciences, namely the need to become more ‘scientific’ and the resulting attachment to more traditional positivist methods’ (Echtner and Jamal, 1997, p.887). Bernstein (1983, p.103) contends against this perspective, (also criticised by Echtner and Jamal), stating that ‘The specific standards of rationality that may be appropriate for scientific activity are not necessarily relevant for understanding the standards’ of other forms of knowledge. Bernstein (1983) argues that it is inappropriate and vicious to classify knowledge into categories like scientific and social scientific. He stresses (1983) that there is no fixed boundaries between the ‘*Naturwissenschaften*’ and ‘*Geisteswissenschaften*.’. To quote Bernstein (1983, p.173-174): ‘But much of this discussion and many of the typical contrasts between *Naturwissenschaften* and the *Geisteswissenschaften* have been based on a false and discredited epistemological understanding of the natural sciences. There are continuities and differences among these various disciplines, and these continuities and differences are shifting and pragmatic’. Echtner and Jamal (1997, p.877)

advocate that prejudices arise ‘because of the desire to divide knowledge into science and non science and to judge the latter by the standards of the former. Such a divisive approach only inhibits greater understanding for all forms of knowledge.’ On the other hand Bernstein (1983) observes that incommensurability or barriers between the various sciences and social sciences can be used to strengthen understanding and intersubjectivity ‘toward the goal of cultivating the types of dialogical communities in which judgement and practical discourse become concretely embodied in our everyday practices. It means that we seek to discover some common ground to reconcile differences through debate, conversation, and dialogue. What matters is not unanimity but discourse’ (Bernstein, 1983, p.223). He advocates (1983) that alternative approaches such as hermeneutics and praxis will allow experts to extend across disciplines to obtain and develop a comprehensive in-depth understanding of all human activity (Echtner and Jamal 1997). To quote Bernstein (1983,p.93): ‘incommensurability does not get in the way of understanding and comparing the concepts-it rather sets a challenge to us of finding out to understand and compare them, a challenge that is met by the artful employment of hermeneutical skills’. In the case at hand to accept alternate philosophical and methodological approaches could help to break the ice of interdisciplinary barriers in the field of tourism, and lead towards the evolution of a distinct discipline.

1.4.3 Conclusion

According to Echtner and Jamal (1997) the fragmentation of theory is a barrier to the improvement of research and education, as well as to the legitimacy of the tourism body of knowledge. Perhaps the integration of theories and philosophies from diverse disciplines could help the development of an autonomous paradigm in the field of tourism. However the way for tourism becoming a distinct discipline has plenty of difficulties. The majority of researchers have backgrounds in various disciplines, such as geography, sociology, marketing and anthropology. From this framework, ‘any tourism theory that is developed forms within specific disciplinary paradigms and boundaries’ (Echtner and Jamal, 1997, p.878). This provokes a situation where each discipline treats tourism from a particular perspective. ‘This academic imperialism is particularly evident between the two camps: impacts-externalities and business- development’ (Echtner and Jamal, 1997, p.878).

In an attempt to bypass this dilemma, Leiper (1981) argues for a clear framework for tourism as a distinct discipline. He contends (1981) that the orthodox perspective to tourism education, multidisciplinary studies has become an obstacle. It is suggested that a new discipline can become the core of an inter-disciplinary approach' (Leiper, 1981, p.69). Leiper's theory is based on the articulation of the system as composed of tourists, generating regions, transit routes, destinations and industry. Moreover, (Lieper 1981) distinguishes multidisciplinary studies from interdisciplinary ones. To quote Leiper (1981, p.72): 'The two terms of multi-disciplinary and inter-disciplinary are often used interchangeably. Fundamentally, they are not synonymous. Multi-disciplinary studies imply simply that more than one discipline is brought to bear on some topic. Inter -disciplinary studies imply something extra, that the methodology involves working between the disciplines, blending various philosophies and techniques so that the particular disciplines do not stand apart but are brought together intentionally and explicitly to seek a synthesis. With inter-disciplinary studies there is an anticipated synergistic outcome stemming from the combined insights'. Leiper (1981) explored the question of defining tourism having in mind a holistic and systemic approach. His 'concept' is presented and expressed as a diagrammatic model in Figure 1.

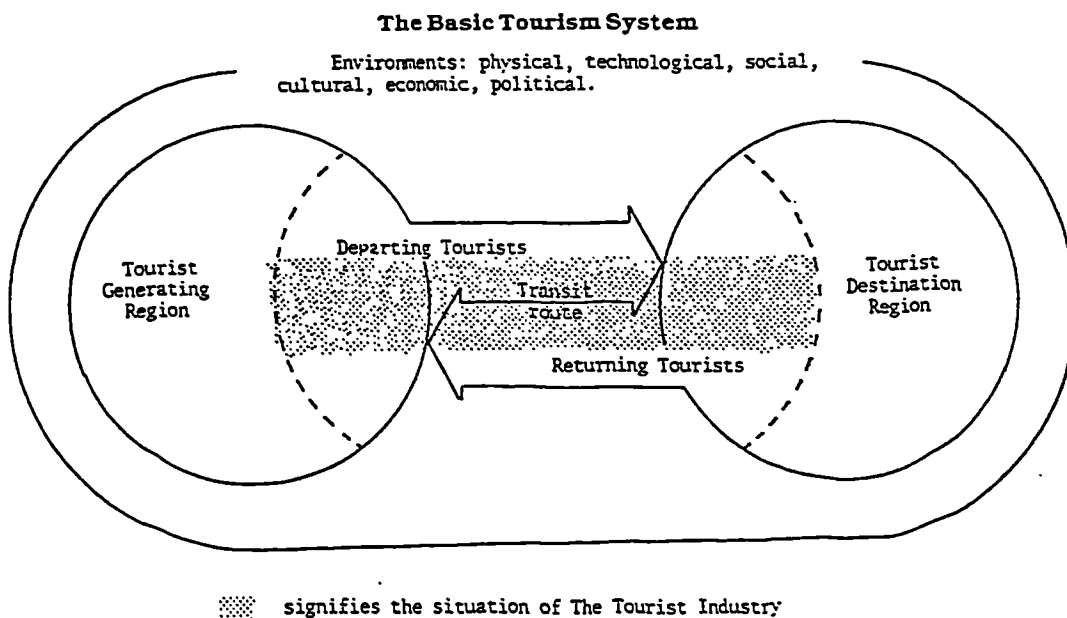


Figure 1.1 The Basic Tourism System

Source: Leiper, 1991, p. 75

Echtner and Jamal (1997) advocate as well, an interdisciplinary approach complemented with an understanding of the methodological and philosophy of science issues integrating the multitude of theoretical developments from the various contributing disciplines. They contend that the study of tourism is both 'enriched and yet complicated by this theoretical diversity' (Echtner and Jamal, 1997, p.879). Furthermore there are several descriptive, explanatory, and predictive models which form the 'building bloc to theories' and 'can apply to whole systems or subsystems' (Getz, 1986, p.23). Integrating these theories, concepts and models with adequate definitions of tourism and tourist under the support of a 'broad paradigmatic umbrella' could serve as a beacon for the accumulation of a 'cohesive body of knowledge in tourism' (Echtner and Jamal, 1997, p.879).

According to Jafari (1992), four tourism research platforms have emerged chronologically but without replacing one another. These are Advocacy (The good), Cautionary (The bad), Adaptancy (The how) and Knowledge-Base-Platform (The why). To quote Jafari (1992, pp.8-9): 'The collective positions of the Advocacy, Cautionary, and Adaptancy Platforms were among the main conditions or forces fostering a number of developments in the thinking about tourism. First was a general recognition that tourism is a giant global industry. Second, any development, tourism included, generates both desirable changes and unwanted consequences; and it is the relationship between the costs and benefits that should matter. Third, the general foci of the Advocacy and Cautionary Platforms on tourism impacts and of the Adaptancy Platform on forms of development represent only partial treatment of tourism. Fourth, therefore, if tourism is viewed as a whole- for a systematic study of it, an understanding of its underlying structures and functions - this would contribute to the formation of knowledge on tourism which, in turn, would aid in further development of theoretical constructs on a phenomenon turned an institution and on a trade turned into mega industry. It was due to these inter-related and evolving views that a fourth position, The Knowledge-base Platform, emerged'. This final platform, aims a scientific foundation of tourism maintaining bridges with other platforms. The knowledge-based attempt (Jafary 1992) includes tourism's relation to various fields or disciplines; systematic research of its structure, its location in larger contexts; its

functions at several levels; factors which influence and are influenced by it; perspectives on mobilising and receiving tourism (Cohen 1979; Dann, Nash and Pearce 1988; Grabun 1983; Grabun and Jafari 1991; Krippendorf 1987; MacCannel 1976; Mitchell and Murphy 1991). These studies are some examples to the contribution of a holistic treatment of tourism; not only its impacts or form, but the tourism phenomenon as a whole. The main objective is the formation of a scientific body of knowledge on tourism. Therefore, as can be illustrated in Figure 1.2, some key dimensions of the study of tourism towards disciplinary status are emphasised.

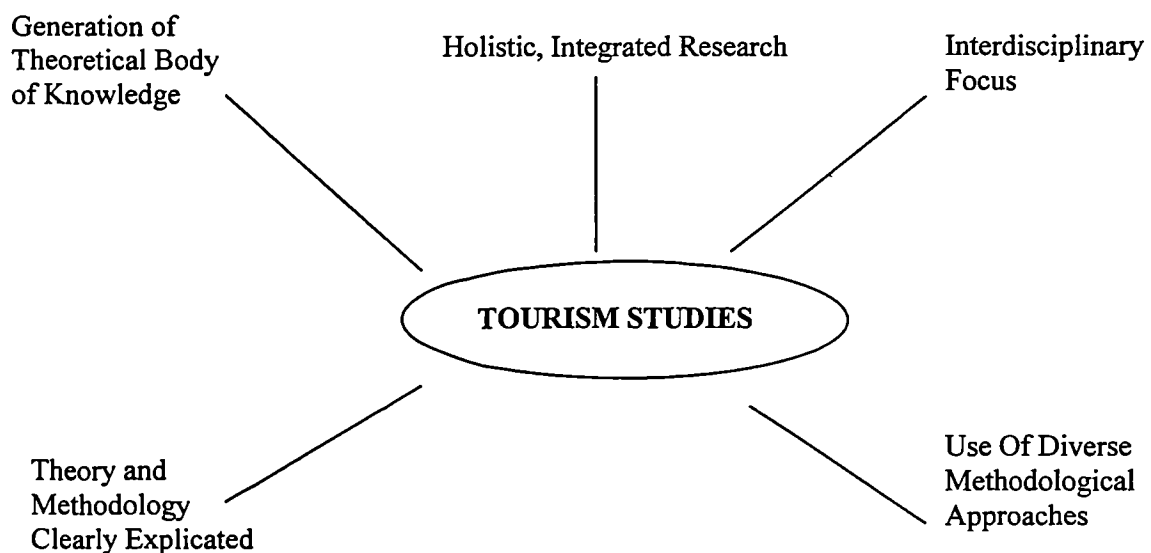


Figure 1.2 Some Key Dimensions for the Evaluation of Tourism Studies

Source: Echtner and Jamal, 1997, p.880

To quote Echtner and Jamal (1997, pp.880-881): ‘There are some signals that tourism is moving toward becoming a distinct discipline. These include the emergence of textbooks, scholarly journals, professional associations, and specific programs of tourism studies...What is urgently needed is greater collaboration, crossdisciplinary and especially interdisciplinary research.’

The issue deserves subsequent research. Now it suffices to say that it is subscribed the position of Jafari in personal communication to the author of this dissertation: ‘tourism is a science, an industry and a business’

1.4.4 John Tribe: 'The Indiscipline of Tourism'

Tribe (1997) presents a new model which exposes the epistemological characteristics of tourism studies. He contends (1997) that various requests and frameworks have been advocated with regard to the epistemology of tourism, around the discipline / field debate. Moreover, he rejects (1997) the status of tourism as a discipline and it is proposed that tourism be developed as two fields (the business of tourism and the non- business of tourism). He includes (1997) in the latter social impacts, tourism perceptions, environmental impacts and carrying capacity. Furthermore, Tribe (1997, p.4) defines tourism as 'the sum of the phenomenon and relationships arising from the interaction in generating and host regions, of tourists, business suppliers, governments, communities, and environments', contending that this definition 'does reveal the key dimensions: Those related to the tourist (including motivation, choice, satisfaction, interaction); those related to business (including marketing, organization and corporate planning of transport, hospitality and recreation); those relating to the host community (including perceptions, economic, social and cultural impacts); those relating to the host environment) including ecological impacts); those relating to host governments (including measurement of tourism policy, and planning); and those relating to the generating country (including economic, environmental, and cultural effects)' (Tribe, 1997, p.4). On the other hand Leiper (1981) registered an enthusiasm for developing tourism as a discipline. To quote Leiper (1981, p.71): 'to overcome the defects stemming from a fundamentally fragmented curriculum, a new discipline needs to be created to frame the core strand in comprehensive programs especially as the professional level'. On the other hand, Tribe (1997) argues that Leiper's tourism theory despite being a useful mapping of the dimensions of tourism does not constitute a unifying theory of tourism and Leiper's suggestion of 'tourology' be used to describe the discipline that he sees as developing on the basis of his general tourism theory. It is a 'suitable name for the scientific study of tourism'. Some 15 years after the publication of Leiper's paper, there is no evidence of such a term being used (Tribe, 1997, p.9). Thus, the attempt by some to legitimate tourism studies as a discipline 'not only fails on logical grounds (i.e., tourism studies does not pass the test), but is also an empty and fruitless one (i.e., disciplines are not the sine qua non of knowledge production).' (Tribe, 1997, p.9).

In lacking disciplinary status, tourism may turn to science for an adequate framework. For example Gunn (1994,p.4) observes that: ‘a way of gaining knowledge is through science’. Gunn notes in science much relevance, an approach of ‘questioning and systematic check’ (1994, p.4), and Tribe (1997) considers that tourism studies require bigger epistemological features than those suggested by Gunn. Several authors, on the other hand (Gunn, 1994) have considered tourism as a field. Gunn (1994) points out the main disciplines that contributed to tourism as marketing, geography, anthropology, ‘behaviour’, business, human ecology, history, political science, planning and design, and futurism. Futurism is stressed as ‘applied history’, ‘has risen to the level of considerable importance and relevance to tourism’ and results when ‘philosophers , scientists, technicians and planners have joined in making insightful studies of trends’.(Gunn,1994, p.8). According to Gunn (1994, p.4) ‘Tourism knowledge today is building through a variety of means. First tourism practitioners know certain things because of tenacity. Second is the method of authority. A third way of gaining tourism knowledge is by means of intuition. The fourth way of gaining knowledge is through science’. Tribe (1997) considers that other than science, Gunn’s analysis, includes ways of knowledge which are ‘no such thing’, like tenacity, authority and intuition.

The model of Tribe (1997) furthermore provides insights into how tourism studies are developing, the way the tourism world is seen and the reasons for divisions among academics, and between academics and ‘trade’. A summary of Tribe’s (1997) conclusions can be presented as follows:

- rather than concerning of the discipline of tourism studies it would be more adequate to think about its indiscipline;
- the tourism studies in higher education tends to concentrate around the business interdisciplinary approach;
- due of the strength of the business of tourism, because the importance of industry, government, think tanks, interest groups, research institutions, consultancies and the power of performativity principle (progress of scientific

and technological knowledge-the best possible input/output equation-the business world of tourism, is increasing faster and faster;

- tourism studies is not an objective value free search of tourism knowledge. The epistemological perspectives of different fields perform a selector role;
- if tourism studies are dominated by researchers of the business of tourism, tourism studies become the business of tourism;
- different approaches and ideologies make communications and intersubjectivity difficult.
- Each camp may filtrate and legitimate knowledge and truth in different ways;
- Academics have tended to underestimate the industrialist perspective, the applied research as being too much concrete and operationally-oriented;
- tourism knowledge and research are influenced by utilitarian economic interests;
- the search of tourism as a discipline should be abandoned. Tourism studies remain in a pre-paradigmatic phase. This status should not be considered as a problem and tourism studies should play the rules of the game recognising and celebrating its diversity.

The chapter presented a sharp introduction to the research. An epistemological approach was argued for better supporting tourism as a science for 21st century.

The next chapter will emphasise background features about Madeira, the space of this research.

CHAPTER 2

BACKGROUND TO MADEIRA

This chapter gives background information on Madeira and its position in the debate about tourism. The chapter is organised in three main parts. The first part describes the main characteristics of Madeira. The second part outlines Madeira as a tourist product and the third part highlights the planning policy towards the impacts and consequences of tourism.

2.1 Location

The Madeira archipelago consists of the Island of Madeira, Porto Santo, the Ilhas Desertas and the Ilhas Selvagens (Figure 2.1).

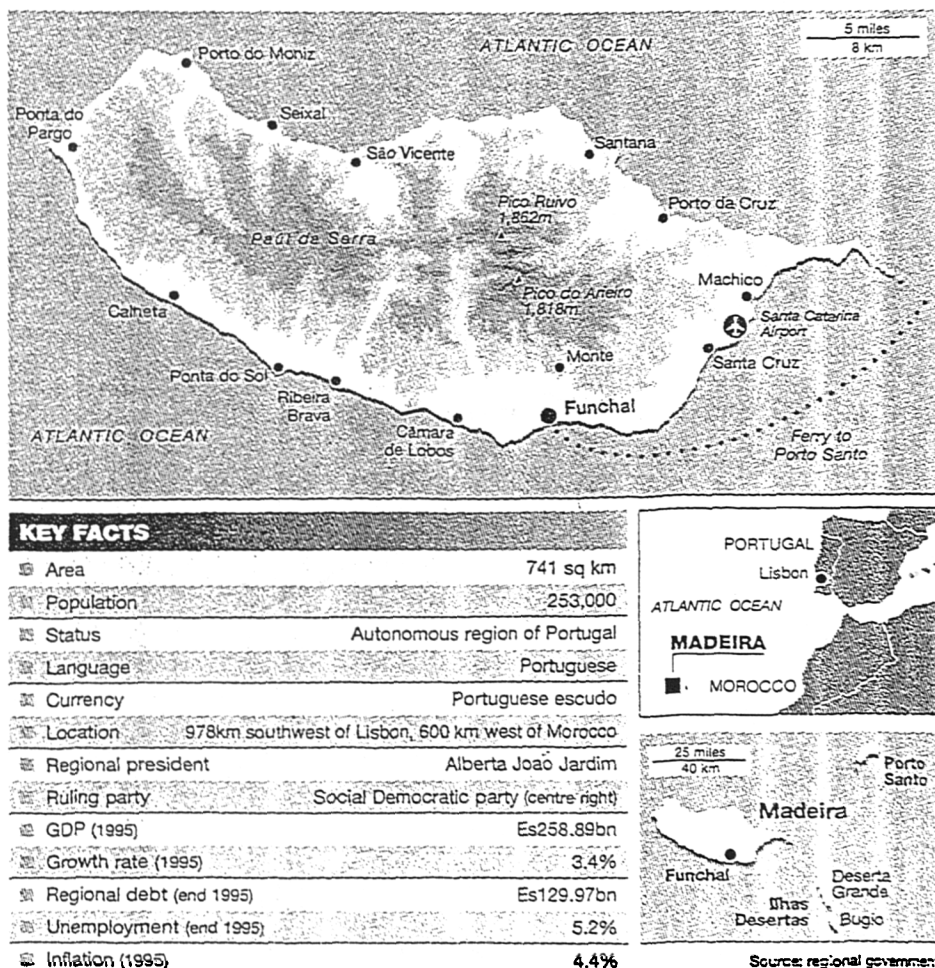


Figure 2.1 Map and Key Facts

Source: *Financial Times*, February 10, 1998, p.11

According to PKFA (1991) Madeira is located off the West coast of Africa in the Atlantic Ocean, 560 miles south west of Lisboa, the capital of Portugal, and 435 miles from the Morocco coast. Due to its latitude, Madeira has a temperate subtropical climate almost all around the year. Madeira has a length of 57km and a maximum width of 22km giving it an area of about 741km². It has strong rainfall both on the north coast and in the highlands, while the south coast where Funchal the capital is located, is protected from the north easterly winds. The natural forest vegetation was destroyed by the first settlers who burnt the lower areas for cultivation. Its volcanic soil and temperate climate, permit a variety of flowers, trees and shrubs to grow at different altitudes, with fruit (mainly bananas) vines and sugar cultivated on man-made terraces. More than 200 species of birds have been identified on the island and the influence of the Gulf Stream favours a large variety of fish and mammals to flourish.

Temperatures are moderate throughout the year, averaging 21°C in summer and 16°C in winter. Sunshine rates average about six hours per day in winter and seven hours in the summer. Rainfall generally occurs between October and February, peaking in November and December, with the mountains having the lion's share. Fog is rare, although a dry wind from the Sahara called Lest sometimes arrives between July and September.

The island of Porto Santo, with its long sandy beaches, located 64km to the north east is different from Madeira in its sea and landscape. Like Madeira it is of volcanic nature. Its dimensions are 11km by 6km, giving an area of 41km². It has an 8km long sandy beach on the southern side and freshwater springs on the north western side of the island.

There are three islands called the Desertas, which are uninhabited. They are approximately 30km away from Madeira. From Funchal, west to east are Ilheu Chao, Deserta Grande and Bugio. Ilheu Chao is approximately 1,500m long. Deserta Grande is 10km long and 1,500m wide and Bugio 7.2km long and 750m at its widest point. The Desertas are considered a bird sanctuary.

The fourth part of the Madeira archipelago consists of a group of three small islands called Selvagens. Great Selvagem is 2.5km long and 2km wide. The remaining two are Great and Little Piton. These islands are a nature reserve and a bird sanctuary and visitors are not officially permitted ashore. (PKFA 1991; Farrow1990)

2.2 History

Officially the history of Madeira begins in 1418 when Joao Goncalves Zarco and Tristao Vaz Teixeira, on passage to Africa, on behalf of Henry the Navigator's main project, "were driven off course by a gale and sought shelter under the lee of an unknown island - Porto Santo (Holy Port)", (PKFA 1991).

Following the same author, Porto Santo's first governor, Bartolomeu Perestrelo was the father-in-law of Christopher Columbus who honeymooned and lived on the island of Portugal, attempting the support from the king as far as discoveries are concerned. To quote Farrow and Farrow (1990, p.17),

'Zarco and Vaz took possession of the island of Madeira which, along with Porto Santo, had no indigenous population (nor have any signs of earlier settlement ever been found). Vaz and Zarco were given half the island each to govern by Prince Henry: the eastern part from Canico (with its administrative centre in Machico) was for Tristao Vaz, and the western part (with its centre in Funchal) for Joao Goncalves Zarco. Zarco ruled wisely for the rest of his life, and the governorships (Donatory Captaincies) were held in unbroken line by his descendants until the Spanish occupation 1580.' (sic)

Meanwhile, and quoting the same authors (1990, p.17)

'Captive moors and slaves from the Canary Islands and Africa, as well as a number of condemned Portuguese criminals, were sent to populate the island. Poor farmers, refugees and adventurers also came from Portugal in search of a better life. To form an aristocracy, four young noblemen arrived to marry Zarco's four daughters. Then came representatives of other Portuguese noble families. The Portuguese settlers were joined, shortly after they began colonising the islands, by adventures from Flanders, Genoa, Poland, France,

England, Scotland and what is now Germany, and they adopted Portuguese versions of their own names.’

Sugar cane was introduced and became an important export business, followed in 1460 by vines from southern of Europe.

Madeira was well located on the Atlantic trading routes between west and southern Africa and Europe and between Europe and South America. Christopher Columbus visited Madeira to buy sugar. According to PKFA (1991) much labour was required to clean land of endemic species, tend crops and build irrigation ditches (later levadas and poios). The island fell to the Spanish between 1581 and 1640 and many protective forts were built in this period. After the restoration of the Portuguese monarchy in 1640, British interest in the island and its wine came back, and in 1660 a Treaty of Commerce was established between Portugal and Britain. In 1801 and 1807, British troops were ‘garrisoned on the island. Many of these troops chose to remain to farm or grow vines.’ (PKFA1991). To quote the same author (1991),

‘Madeira’s modern tourism industry has its origins in the 1850s with the beginnings of tourism to the island, initially as a health resort for tuberculosis sufferers, because of the clear air and mild climate. Visitors arrived by ship. In 1921 the first seaplane arrived in Madeira but it was not until 1949 that a commercial seaplane service was established for passengers from Britain and northern Europe. Less than a decade later, a fatal accident brought flights to a halt, and for several years there was no air service to the islands, until first, Porto Santo and then Madeira gained airports in 1960 and 1964 respectively. Madeira became an autonomous region of Portugal in 1976 and is now autonomous in everything except foreign affairs, finance and defence’. (sic)

The ruling party is the Social Democratic Party (centre right).

2.3 Population and Emigration

According to the most recent Census in 1991 (Census 91, p.15) the resident population of Madeira was 253,426 with 115,403 people living in the parish of Funchal, giving a high population density of over 1,400 persons per square kilometre.

Madeira's traditional economy is based on labour-intensive farming and viniculture, with emigration remittances and tourism the main contributors to the economy of the island. As quoted in PKFA (1991), 'Funchal is the tourist and service centre and the town provides the main source of employment on Madeira. The north side of the island and western parishes are less populated than the south and south east parishes reflecting better access and more favourable climate on the south coast' (sic). Since 1976, the resident population has increased and emigration has decreased. The age distribution in Madeira and Funchal is given in Table 2.1.

	Age Category	Numbers	%
MADEIRA	0-14	62,002	24.4
	15-24	46,800	18.4
	25-64	115,205	45.4
	65+	29,419	11.6
FUNCHAL	0-14	26,197	22.7
	15-24	20,640	17.8
	25-64	55,648	48.2
	65+	12,918	11.1

Table 2.1 Age distribution of population in Madeira and Funchal

Source: Census 91, p.16

In Funchal the active population is estimated to be little more than 50,000 comprising 46,690 employed and 3,771 unemployed. Details are shown in Table 2.2.

Category	Numbers	%
Students	14,592	12.6
Pensioners	11,038	9.5
Housewife/Husband	13,884	12
Incapable	2,696	2.3
Other	2,848	2.4
Unemployed	3,771	3.2
Total	48,825	

Table 2.2 Occupational Status in Funchal

Source: Census 91, p.91

Population 12 years old and above. Non economically active population.

For Madeira the active population is 104,938 with 6,896 unemployed. The details are given in Table 2.3.

Economically Active Population		Non Economically Active Population	
Category	Numbers	Category	Numbers
Employed	98,042	Students	28,680
Unemployed	6,896	Housewife/Husband	33,819
		Pensioners	27,089
		Incapable	5,791
		Other	5,635
Total	104,938	Total	101,014

Table 2.3 Occupational Status in Madeira

Source: Census 91, p. 91

Population 12 years old and above.

It is estimated that there are over one million Madeirans abroad, called the 'saudade market'. As Farrow and Farrow commented (1990, p.30): 'When the islands were first settled, the population began to increase rapidly and the number of inhabitants soon exceeded the resources, prompting emigration to other Portuguese lands'. According to the same authors (1990, p.30): 'No precise official figure on emigration exists before the end of the nineteenth century'. The first emigrants went to Brazil and the Portuguese African colonies (due to common language) and as time went on, they choose British Guiana, the Hawaiian Islands, North America and Curacao as well as South Africa, Venezuela, Australia and Europe (ibid., p.31). According to the same authors there are an estimated 190,000 Madeirans in Venezuela and about 600,000 in South Africa. Surprisingly the small island of Jersey has about 5,000 Madeirans, most of them seasonal hotel workers. As stated by the same authors (1990, p.33): 'In fact, there are few corners of the world where Madeirans are not to be found: from Alaska to Australia, from California to Macau. In Madeira, to stand behind a little old peasant lady, dressed in black, in the bank cashing her cheques from the family worldwide is quite an experience. She is an expert in exchange rates, with her cheques in many different currency denominations. She may not be able to read or write but she can convert dollars, francs, rand, etc into escudos!'

2.4 Climate, Landscape and Natural Features

Following Farrow and Farrow (1990, pp., 34-42) the island of Madeira has one of the most uniform climates in the world. It is warm all year round, with hot summers, mild winters and moderate rainfall. Summer temperatures are about 27°C (86°F) and winter weather never is below 10°C (52°F). Moreover there is a variety of microclimates according to a small island in the Atlantic Ocean with altitudes from sea level to 1,800 metres.

Precipitation, about 550mm per annum in Funchal, falls both in short and heavy showers. From May to September, there is almost no rain; from October to February, rain falls on average, five to seven days per month. In winter, snow can fall on the highest mountains and at the same time one hour's drive away in Funchal, people can be swimming and sunbathing. Between December and April, the temperature averages between 15°C and 21°C (59°F to 70°F); after increasing to about 21°C and

24°C (70°F to 75°F) between July and September, falling again to an average between October and December of 18°C to 21°C (64°F to 70°F). In June and July, heavy cloud may arrive and the weather can be very humid.

As far as winds are concerned, those from the north-east bring sometimes a 'leste' (hot and dry wind) originating from the desert areas of North Africa. During these times the temperature can be about 40°C (104°F) and the humidity drop to below 10%.

Meanwhile the seawater temperature is at its highest level in September (21°C, 70°F) and can fall to 16°C (61°F) in March. Quoting the same authors (*ibid.*, 1990, p.35): 'The weather in the mountains can change very rapidly, and mists can descend suddenly, particularly in the winter months. Very often the day starts clear and bright in the mountains, and this continue until about 11 a.m., when misty cloud develops between altitudes of 500m and 1,200m. This is caused by condensation, which moves upwards as the temperature at lower altitudes rises. The reverse process often takes place in the evening and the mountains become clear and sharp again. Above 1,200m you can often enjoy beautiful weather and look down on a sea of white clouds, with the occasional peak protruding through. The impression is one of being on the roof of the world, giving an "impressionist frame". Thomas Stanford, in his book, "Leaves from a Madeira Garden", states (with regard to the changing climate and scenery) that in Madeira one can travel, in the space of an hour, from a sub-tropical region to the Riviera, from Riviera to Bournemouth, from Bournemouth to Caernarvonshire, and from Caernarvonshire to the Alps. It truly is an island of contrasts' (*sic*). Quoted in Farrow and Farrow, 1990.

From a geomorphologic point of view, Madeira can be divided into three main areas, namely the central mass, the western part and the eastern area, as shown in Figure 2.2.

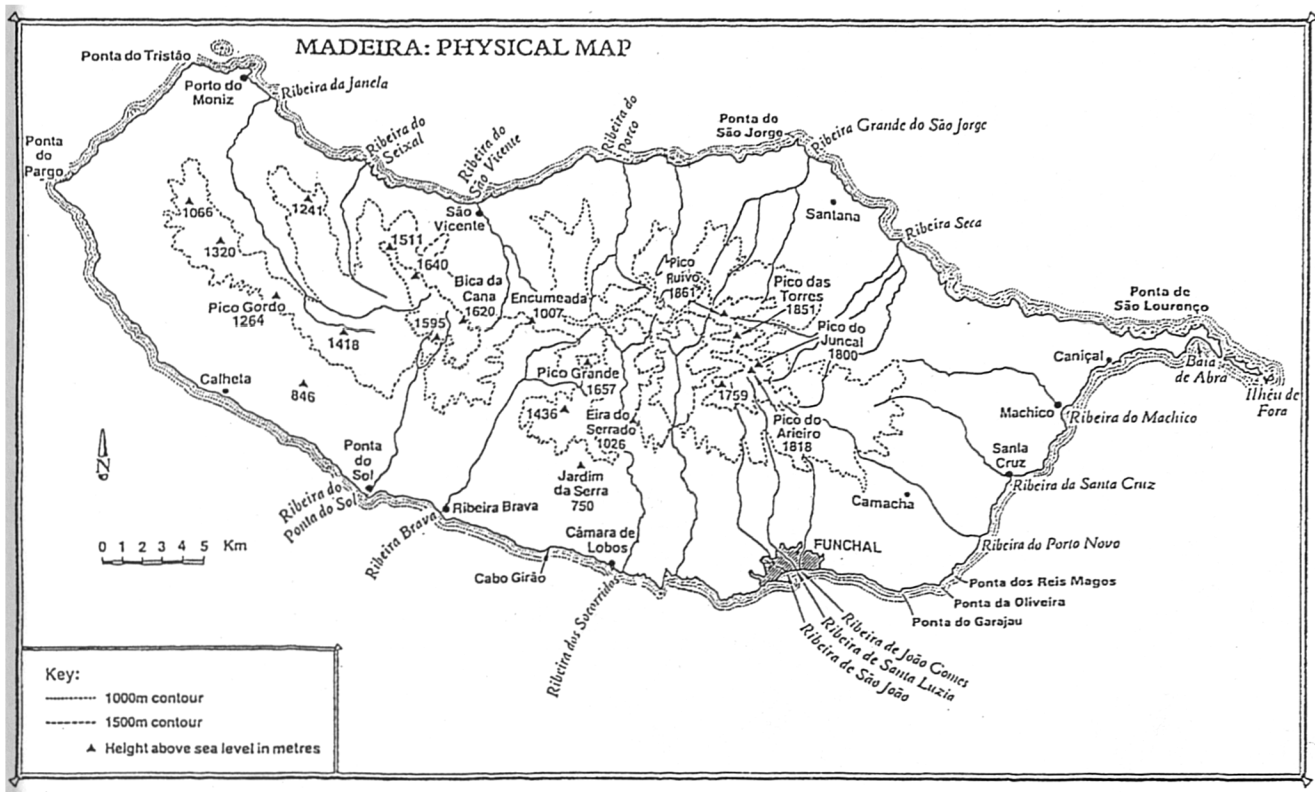


Figure 2.2 Madeira Physical Map

Source: Farrow and Farrow, 1990, pp., 36-37

The central area is volcanic at its origin. Eruptions began from under the sea within the Miocene period about 20 million years ago. The submarine eruptions built up layers of material which came up above the ocean's surface as a small island, and coral reefs appeared around its edge. The island rose and igneous intrusions took place. It:

'became elongated west-north-west/east-south-east by successive eruptions of lava and ash from volcanic cones along the top of the ridge. The maximum height thought to have been reached during this period is 2,000m. The island became covered with vegetation, fossils of which are sometimes found in the volcanic ashes. The volcanic eruptions are thought to have finished some 1.7 million years ago, and the volcanoes are considered extinct'..... The western part of the island is separated from the central mass by the deep ravines between Ribeira Brava and Sao Vicente. It is made up of volcanic formations deposited in a north-west to south-east direction, the plateau of Paul da Serra

being the main core. This plateau is about 17km long, 6km wide and 1,200m to 1,500m high.The eastern part of the island, ending in the narrow, curving peninsula of Ponta de Sao Lourenco, consists of the small plateau of Poiso, Chao das Feiteiras and Santo da Serra. These small plateau, covered in basaltic lavas, are similar in formation to that of Paul da Serra to the West of the central mass. Shell sand, blown into the area between Canical and the end of the island in recent geological times, contains fossil shells and root-and branch- shaped concretions of the vegetation which existed at that time' (sic). (Farrow and Farrow, 1990, p.39).

“The volcanic rocks of the island of Madeira (tufas and volcanic ashes interbedded with basaltic lavas have long been subject to the effects of rain and rivers. Differential erosion of the rocks has resulted in the hard rocks being left as peaks separated by deeply eroded valleys and ravines. Today Madeira consists of a curving longitudinal ridge with minor ridges running north and south from it. All valleys are deep with steep, often precipitous sides. Between the mouths of the rivers are high cliffs, some of the highest in the world, with vertical columns of basalt and layers of red and yellow tufa exposed in some places. The central mountains of Madeira are about 1,860m above sea level, the three highest peaks being Pico Ruivo (1,862m), Pico das Torrinhas or Torres (1,851m) and Pico Arieiro (1,818m)’.

(Farrow and Farrow, 1990, pp., 39-40). For more details see Figure 2.3.

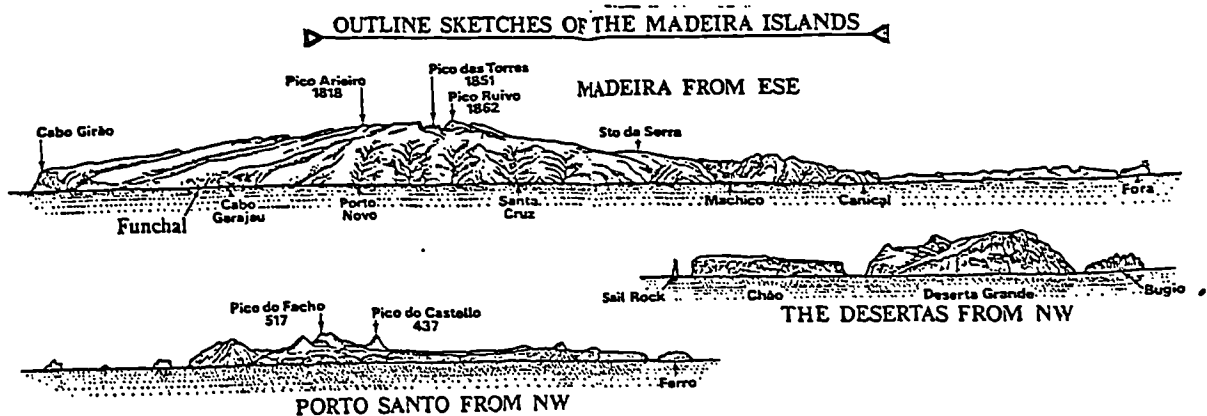


Figure 2.3 Outline Sketches of Madeira Islands

Source: Farrow and Farrow, 1990, pp., 40-41

One of the best descriptions of the landscape of Madeira is that given by White and Johnson (1860): ‘When Columbus was asked by Queen Isabella to give her some notion of the configuration of Jamaica, it is said that he took up a sheet of paper, and after crushing it on the table, he told her Majesty that she would derive a better idea of the island from the crumpled paper than from any description conveyed in words. The same rough model would serve very well for Madeira, the physical geography of which is composed like Jamaica, of hill and hollow in endless iteration’. Quoted in Farrow and Farrow, 1990, pp., 40-41. Following the same authors (1990, p.41):

‘Prainha, at the eastern end of the island, has the only natural sandy beach in Madeira, albeit black sand. There are beaches of rounded grey basalt pebbles of varying sizes elsewhere around the island. At the river mouths are stones and huge boulders brought down when the rivers are in flood, although most of the year there is so little water in the rivers that it is hard to imagine. According to soundings made in the surrounding ocean, there is some very deep ocean trenches in the sea around the island. The shore slopes steeply down into the sea and, if the ocean were to dry up, the island would emerge in a single block some 5,400m above the sea bed’ (sic).

As far as soils are concerned ‘in parts of Madeira (above 800m) the heavy precipitation has made a profound alteration in the basalt to form clays that are reddish in colour. This coloration shows the presence of iron oxides. The forest areas have deeper soils with an organic layer. At the highest level the soils are skeletal. Below 700m many of the soils are man-made - the soils on the terraces having been brought up from the river mouths or down from the bases of escarpments’. Farrow and Farrow, 1990, p.42.

2.5 Madeira Economy: An Overview

The principal economic activities of the island are tourism, wine, embroidery, basket weaving, bananas, and the International Business Centre of Madeira which includes the Free Trade Zone, offshore financial, international services and International Shipping Register with special fiscal regimes which can stimulate the regional development of the island. The International Business Centre is managed by the Madeira Development Company (Sociedade de Desenvolvimento da Madeira).

According to Wise (1998) over two decades, 150km of new highways have been built across the island. In effect improving travel and infrastructure building, has been a main opportunity for employment - helping to keep the unemployment rate at approximately 5 per cent and favouring the economic growth rate (more than 6 per cent in 1997). To quote the same author (1998, p. 12): 'Public works and construction have grown to account for about 12 per cent of Madeira's economy today from only 5 per cent in 1976, helping to cut the unemployment rate by half to 5 per cent and virtually halting the previously high rate of emigration by unskilled workers to Venezuela, Brazil and South Africa. As work on the road network and extending the airport runway nears completion, the island is having to import labourers from mainland'.

Portugal joining the EEC in 1986 had major implications for the autonomous region of Madeira, despite having negative consequences for exports like bananas and wine. According Peter Wise (1998, p.11) in 2,000 the present six year EU aid programme for Madeira, will have come to the end. Between 1994 and 1999 the Union have channelled more than Esc 250 bn (\$4bn) in structural funds to the island, about three times more per capita than mainland Portugal.

On the other hand, there is good news for Madeira. The ratification of the Amsterdam Treaty includes a clause that gives to Madeira- and five other small territories - the permanent status of 'ultra-peripheral' regions of the Community. This enables, Madeira to receive privileged treatment in terms of subsidies, grants and other incentives, 'to help offset the disadvantage of insularity' (Wise, 1998, p. 11). The same author comments (Wise, 1998, p.11): 'This is welcome news for Madeira but it is also a reflection of how backward the region remains. Under the new regional, rather than national, criteria for EU structural funds after 2,000, the Lisbon area, for example, may no longer qualify for aid, as GDP per capita will be above 75 per cent of the Community average. Since 1976, GDP per capita in Madeira has been lifted from 40 to almost 70 per cent of that in mainland Portugal but this impressive improvement still leaves the region with less than half the EU average, up from 24 per cent in 1976.'

Moreover a guarantee has been given by the socialist government in Lisbon to the autonomous regional government of the island. In addition a law was approved establishing a fixed amount of financial transfers from the central government budget, making it possible for Madeira to have less uncertainty when negotiating the amount every year. In effect it is estimated that in 1998, transfers from Lisbon and Brussels account for about 15 per cent of budgeted spending by the autonomous regional government of Funchal. In addition and stating Wise (1998, p. 11):

‘a revision of Portugal’s constitution in 1977 also confers on Madeira the right to adjust national taxes and other legislation to its specific needs. Of more immediate impact was a decision by the central government to absorb Es 110, bn, 60 per cent of Madeira’s public debt by the end of the year. This provides a ‘second wind’ to raise capital for more infrastructure building, namely water and sewerage systems, other facilities and environmental protection’.

Tourism is a traditional sector that is in expansion. It is estimated to account for about 20 per cent of the GDP and more than 15 per cent of employment.

In 1976 farming and fishing represented 20 per cent of the workforce, but only 12 per cent in 1998. Manufacturing, with the exception of around 1,000 jobs created in the free trade zone is limited to the regional market of Madeira and ‘has declined from representing almost 40 per cent of employment a decade ago to about 28 per cent, while the service sector has climbed to account for 60 per cent of jobs, up from 41 per cent only ten years ago’ (Wise, 1998, p. 12).

A big challenge and competitive advantage should be creating jobs for a new generation better educated and skilled than the previous ones. It is estimated, that over the last 20 years, the illiteracy percentage has fallen from 40 to 10 per cent of the population, the secondary schools have grown from 2 to 13 and about 2,000 students graduate from university each year - many in Madeira - much more than the 10 in 1976. (Wise1998). According the same author Madeira has opened a new technology park, The Tecnopolo, for preparing better the economy for the 21st century. The main research areas of the Tecnopolo are marine biology, environmental sciences, information technology and astronomy aiming to make Madeira ‘a pilot

region for creativity in the digital society'. In effect, the overall aim is to prepare the island with scientific, technological and research areas as an opportunity of employment for the young generation. Moreover the Tecnopolo benefits from the same tax advantages like Madeira's International Business Centre (IBC) including zero-rate corporate tax, and other European Union investment incentives, having close links with IBC. In the same space as the Tecnopolo, an area of 46ha, are situated the Business Innovation Centre supporting technologically oriented firms, Madeira's International Fair and Congress, the University Campus and other scientific and cultural institutions, all of them with the support from EU.

In addition the International Business Centre of Madeira a trigger for regional development, after several negotiations with regional, national, and EU representatives began issuing licences in 1988. In 1998, more than 2,700 companies have joined. This gave opportunity for the creation of about 1,500 jobs directly, and a few hundred indirectly. The most important sector of the IBC is the international services division which attracted 2,530 companies, a further 44 setting up in the financial centre (Wise, 1998).

2.6 Transportation

The majority of visitors to Madeira travel by air transport. Once the usual way of travelling between the different parts of the island was by boat (Farrow and Farrow, 1990). Following the same authors (1990, pp., 57-60) 'there are still tourist boats taking visitors to see Cabo Grao or Machico or for swimming in the sheltered coves'. Car hire is available in Madeira and taxis (about 1,000 in the island and 500 in Funchal) are also available for hire for full or half-day excursions. There are buses and all routes start and finish in Funchal, as the main hub. For people not wishing to explore the island by bus, hire car or taxi there are organised coach excursions as an alternative.

Walking, especially along the 'levadas' and mountain paths is still a common pastime. Madeira had some peculiar forms of transport but most of them are not in use nowadays. 'The bullock sledge was a canopied carriage without wheels which slid along the cobbled streets on wooden runners and was hauled by two bullocks harnessed beside each other This form of transport was available in Funchal until

the early 1980s for tourist excursions in the centre of Funchal and near the Savoy and Sheraton Hotels'. Farrow and Farrow, 1990, pp., 58-59. As observed by the same authors: 'The hammock which was slung from a long pole carried on the shoulders of two men, was used for transporting the sick and infirm across rough country terrain and, in and around Funchal, for the rich and for the tourists These hammocks were used until the 1920s to carry tourists to Monte and the surrounding countryside, the pole-bearers being human taxis'. (1990, p. 59). As observed by the same authors (1990, p. 59): 'The Monte toboggan unlike the bullock sledge and the hammock which now remain as exhibition pieces, is still in daily use, albeit as a tourist attraction, (also personal experience). It was invented by Mr Gordon as a rapid means of transport between his house at Monte and his office in Funchal. The toboggan consists of a wide wicker basket with a cushioned seat, set on wooden runners. Powered by gravity, it transports tourists down the slippery cobblestones from Monte to Funchal. White suited drivers wearing straw hats and Madeiran boots, run alongside, pushing the toboggan to gain momentum. They then jump onto the runners behind the toboggan, steering and restraining it with ropes. The descent, like a big dipper, is exhilarating but perfectly safe.' There used to be a railway between Funchal, Monte and Terreiro da Luta which closed in 1939.

Tourism being the most important sector of Madeira economy will receive a boost in 2000 with the 500m extension of the runway of the airport of Funchal. This can open new markets, namely US, Canada and Latin America 'by enabling bigger aircraft from further afield to reach Madeira and by lowering travel costs'. (Wise, 1998, p.11). As said by the same author 'travel costs for Madeira residents, already reduced to about 70 per cent of the normal tariff by government grants, need to be cut ever further, as a matter of human rights', says Mr Jardim (President of Regional Government). He believes 'a citizen of Madeira should be able to fly to Lisbon as cheaply as any other resident of an EU country can travel from an outlying region to the capital, otherwise, we will be living in a prison' (1998, p.11). On the other hand businessmen argue this is a matter not only of EU subsidies but more competition is required on the Lisbon-Funchal air route, a TAP-AIR Portugal monopoly, and competition extended in shipping and port operations to lower passenger and freight costs.

PKFA (1991) observes that 'Funchal has been a "difficult airport" since its inauguration in 1964 and by extending the runway further into the sea will contribute to the development of tourism to the island allowing a wider range of aircraft to be used, enabling landings by transatlantic and other long-haul services', off-setting the risk and safety that some travellers still have when landing in Madeira and facilitating the development of the Free Trade Zone and exports.

As far as the cruise market is concerned 'Madeira's tourism industry has been linked with the sea trade routes from its earliest origins when the island was used as a "port of call-watering hole" by explorers such as Columbus travelling between Europe and the New World. In later years Madeira was a popular "break-point" for the British travelling to India via the Cape of Good Hope. The climate of Madeira was thought to be ideal for travellers to become acclimatised either to the heat of the tropics or the cold of northern Europe' (PKFA1991).

In the 1960s the construction of the airport altered the situation. Until that time Madeira has been a 'port of call' for ships plying between Europe and the Caribbean, South America and Africa. Meanwhile the cruising market began to grow and Madeira became a popular port of call for the modern cruise market. Concluding with (PKFA1991): 'Madeira is well-regarded as a cruise stop and enjoys a high reputation with operators offering short cruises around the Canaries and North Africa. This market is likely to expand further as the popularity of cruising grows with Europeans'.

2.7 Tourism

'The history of tourism in Madeira is practically yet to be written. The non existence of a critical, monographic study prompts us to raise issues which remain indeterminate, namely the characterization, the conceptualization and the division into historical periods of Madeiran tourism'. (Ferreira et al ,1985, p.16). The same authors (1985) observe the bibliography, despite being considerable and varied is not systematised. Travellers' narratives are a tool of information and include the travel reports of the Italians (18th and 16th centuries), those of the English, to which country there is a longstanding alliance with Portugal since 1376, covering the 17th century and being dominant until the 20th century, those of the French (18th,19th and 20th

centuries) and those of the Germans covering the last two centuries. Also newspapers are a useful source of information for 19th and 20th centuries.

As far as statistics are concerned and as said by the same authors (Ferreira et al, 1985, p.16):

‘the 20th century material available is scarce and hardly worked out in detail, save that existent in some departments, namely the Regional Direction of Ports (which holds data on the movement of the Funchal harbour) and the Statistics Department. Let us say Madeira was minimally attracted by quantitative techniques, which in fact raises serious problems to those who resort to the aforesaid methods in order to ascertain the extent and quantity of past events, aiming at the understanding of the present. The non-existence of documents prevented us from working up statistical series on 20th century lodgings and hotel workers, and their evolution. On the other hand, the quantitative material at our disposal set us strict chronological limits, hindering the definition of Madeiran tourism during the 20th century, the period that we chose to treat this expositive sample.’(sic).

Madeira has been a pioneer of modern tourism like other nineteenth century resorts such as Baden-Baden, the Italian Lakes and the French Riviera. It was both a health resort and a winter retreat for upper classes (Farrow and Farrow, 1990). They observe that tourism began earlier, with the fame of its healthy climate. Between 1747 and 1751 the British physician Dr Thomas Heberden ‘kept weather records which showed the excellence of the winter climate - pleasant between October and May, being not too humid and not too dry, with dust-free air. Other members of the medical profession became interested in the winter climate, and the island began to be recommended for the treatment of and convalescence from a whole range of ailments from anaemia to gout. During the nineteenth century it became more specifically recommended for consumptive patients - initially in Funchal itself and later, at the beginning of the twentieth century, at Monte, when the Monte Palace hotel opened a magnificent park.’ (Farrow and Farrow, 1990, p.70).

On the other hand 'The companions of invalids explored the island on foot, on horseback and in hammocks and palanquins. They took with them their sketchpads, diaries, palettes and easels (later their cameras). Gradually the island became more widely known through picture albums, engravings and travel books. During the mid nineteenth century the Illustrated London News often carried reports about the illustrations of Madeira' (Farrow and Farrow, 1990, p.70). In those days many people spent the winter months in 'quintas' (large houses on farms). In 1836 a 14 year old Scottish youth, William Reid arrived at the island with £5 in his pocket, sent by his father. By the age of 25, Reid had become a wine merchant, and started renting and managing 'quintas' for people from northern Europe. Some of these 'vilas' were converted into hotels and he acquired a very pleasant site overlooking the harbour of Funchal on which he planned to build a hotel. He died three years before the hotel was finished, in 1889 aged sixty-six. The hotel was left to his two sons, being called the Reid's hotel. Later it passed to the Blandy family 'another great British-Madeira dynasty', and it was acquired by the Orient- Express company in 1996 (Lodge, 1997). Winston Churchill, a usual client of the luxury Reid's hotel, contemplating that holiday in Madeira, he cabled the British consul: 'Query warm, paitable, bathable, comfortable hotels etc'. History has not recorded the consul's replay but it could have been: 'Yes ,Yes, Yes, Reids' (quoted in Lodge, D., *ibid.*, p. 69).

In the 19th century, sailing ships or steamships from the UK spent between eight and twelve days on a trip from Southampton to Madeira. Royalty arrived by private yacht or steamer. In 1847-48 Queen Adelaide, widow of William IV, visited Madeira on medical advice. In 1849 Prince Maximilian, Duke of Leuchtenberg arrived on board the Russian frigate Kamchatka. In 1852 Empress Amelia, widow of King Pedro IV of Brazil, and her daughter arrived on a Portuguese boat, and in 1860 Elizabeth, Empress of Austria, wife of Franz Josef, (well known by Sissi), arrived on the British royal yacht Victoria and Albert (Farrow, and Farrow 1990). 'In 1930 the Prince of Wales, later King Edward VIII and then Duke of Windsor, visited the island. Also in the 1930s came Prince Henry, Duke of Gloucester, and Prince George, Duke of Kent. More recent royal visitors have included Saudi princes. In 1985 the royal yacht Britannia spent two days in Madeira and Porto Santo with HRH Prince Philip, Duke of Edinburgh, HRH Princess Alexandra and Mr Angus Ogilvy on board. 1986 saw visits from the King and Queen of Sweden and President P.W.Botha of South Africa.'

(Farrow and Farrow, 1990, p.72). By 1890, Madeira was a popular destination with the British, French and American upper classes. This type of people continued being clients until the 1960s .

According to Farrow and Farrow (1990) the increase in tourism provoked a great change in hotel beds. In the 1930s there were about a thousand beds in twelve hotels. By 1960 there were 1,300 beds but by 1985 this number had risen to 12,000. In 1998 there were plans for growth about 4-5 per cent a year, from 18,500 to a maximum of 28,000. Funchal has 73 per cent of the island's hotel beds. Even after 200 years of tourism tradition, Madeira is not oversold. It is said that after the airport runway is lengthened, 10 to 15 per cent more passengers will visit, requiring Madeira to enlarge its hotel capacity by about 2,500 beds (Wise, 1998). There is a general consensus among both the trade and public sector that quality is what matters as a strategy for tourism in Madeira. They want to maintain the predominance of five and four star hotels which account for approximately 60 per cent of the island accommodation. Even Conceicao Estudante, Regional Director of Tourism confirmed to the author of this dissertation, a sustainable development strategy where growth in income should be better than growth in size. On the other hand she said to Wise (1998, p.13) 'by increasing occupancy rates, the number of days visitors stay and the amount they spend, we can improve the contribution of tourism to the economy without threatening the environment on which the sector depends'. In 1997, 600,000 tourists spent 4.5m nights in Madeira with a average stay of 7 nights per visit. This represents an average occupancy rate of 62 per cent (Wise, 1998). More details are given in Figures 2.4 and Table 2.4.

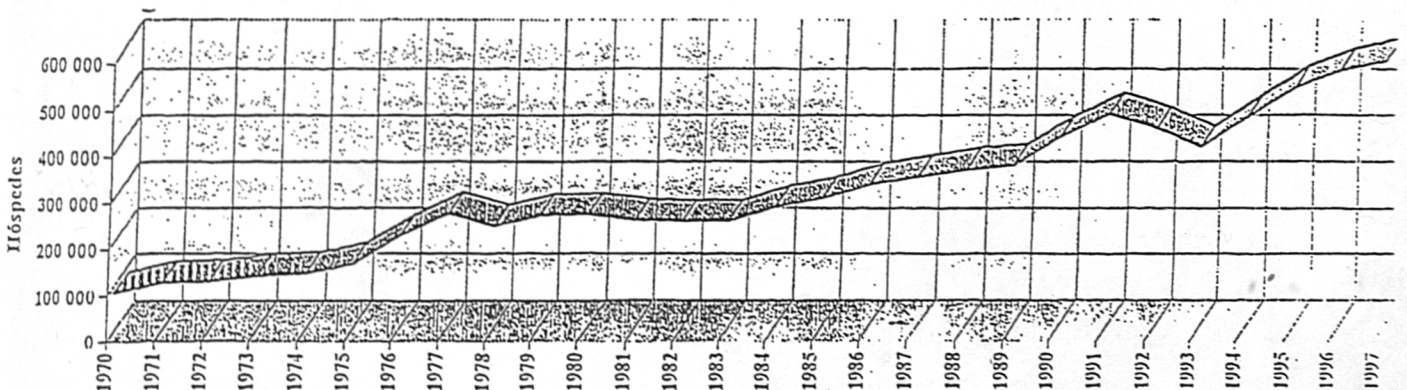


Figure 2.4 Tourist Arrivals

Source: DRE, 31.12.97

	Tourists					Bed Nights				
	1997	1998	Difference 98/97 %	Quota de mercado %		1997	1998	Difference 98/97	Quota de Mercado %	
				1997	1998				1997	1998
United Kingdom	121,878	135,568	11.2	20.8	21.4	1,034,060	1,135,555	9.8	24.5	25.3
Portugal	120,495	130,905	8.6	20.5	20.6	479,689	523,303	9.1	11.4	11.7
Germany	130,247	128,707	-1.2	22.2	20.3	1,218,331	1,109,803	-2.3	28.9	26.6
France	28,716	33,430	16.4	4.9	5.3	170,945	184,566	8.0	4.1	5.1
Switzerland	29,756	32,465	9.1	5.1	5.1	228,756	250,314	9.4	5.4	5.6
Holland	20,993	25,056	19.4	3.6	4.0	136,284	157,228	15.4	3.2	3.5
Dinamarca	19,044	21,244	11.6	3.2	3.4	144,836	163,934	13.2	3.4	3.7
Austria	18,535	21,122	14.0	3.2	3.3	144,388	164,433	13.9	3.4	3.7
Finland	17,267	17,805	3.1	2.9	2.8	142,140	143,913	1.2	3.4	3.2
Belgium	15,318	15,898	3.8	2.6	2.5	115,595	117,821	1.9	2.7	2.6
Spain	15,470	15,425	-0.3	2.6	2.4	89,881	88,033	-2.1	2.1	2.0
Norway	11,384	13,325	17.1	1.9	2.1	91,403	106,703	16.7	2.2	2.4
Suica	10,839	10,670	-1.6	1.8	1.7	63,624	65,869	3.5	1.5	1.5
Italy	6,152	7,660	24.5	1.0	1.2	35,051	44,315	26.4	0.8	1.0
EUA	4,504	5,653	25.5	0.8	0.9	21,945	26,206	19.4	0.5	0.6
Ireland	1,315	3,269	148.6	0.2	0.5	8,969	25,281	181.9	0.2	0.6
Brazil	2,399	2,908	21.2	0.4	0.4	11,076	11,731	5.9	0.3	0.3
Luxembourg	2,509	2,256	-10.1	0.4	0.2	23,907	20,556	-14.0	0.6	0.5
Russia	1,170	1,418	21.2	0.2	0.2	9,890	12,209	23.4	0.2	0.3
Canada	1,139	1,263	10.9	0.2	0.2	6,353	7,304	15.0	0.2	0.2
Greece	2,020	1,058	-47.6	0.3	0.1	7,537	4,089	-45.7	0.2	0.1
Japan	500	613	22.6	0.1	0.1	1,719	2,216	28.9	0.0	0.0
Israel	816	468	-42.6	0.1	0.1	4,505	2,247	-59.1	0.1	0.1
Other	3,972	5,838	47.0	0.7	0.9	26,324	34,498	31.1	0.6	0.8
Total	586,427	634,024	100.0	100.0	100.0	4,217,208	4,483,127	6.3	100.0	100.0

Table 2.4 Tourists and Bed Nights

Source: DRE, 31.12.98

Meanwhile the island has neither the capacity nor the evidence to become a mass tourism destination, due both to natural barriers and lack of beaches. The island has been, since the 18th century, a place for rich middle aged tourists. Following Ferreira et al, (1985) until 1930 the main flow comprised aristocrats, financiers and the residue of the therapeutic tourism. 'Then starts a period of alteration, coinciding with the general economic depression that culminated in World War II. The island was used as a transit area by transatlantic ships, and visited mostly by wealthy English and Germans, who sought escape from universal violence, seeking more peaceful geographical area' (Ferreira et al, 1985 p. 19.). According to the same authors (1985, p.19): 'Another type of tourist visits from 1935 onwards, as a consequence of the Nazi social policy: "Kraft durch Freude", that is, strength through joy. The objective of

this organization, a branch of the National-Socialist Party, was to provide sportive and cultural activities for German workers, who enjoyed cruises on steamships of the German merchant navy, such as “Der Deutsch”, “Oceana”, “St Louis”, “Wilhelm Kresthoff” and “Robert Ley” which stopped at Funchal.’

Due to the importance of tourism the ‘Class Association of Servants and Correlative Arts of Funchal’ was created in 1923, having its lists until 1954 foreign workers (English, Italian, Spanish and Eastern Europeans) showing both an embryonic class organisation and the strength of tourism. In November 1930 the Tourism Commission had its first meeting. It comprised two commissions - that of the General Council of the District (Junta Geral do Distrito) and that of the Funchal Town Hall, both of them working for tourism development. In 1931 at Leipzig Fair, Madeira was represented with a stand and ‘began to be visited by groups of journalists, foreign and Portuguese, who sent propagandistic articles to their newspapers and magazines, namely ‘The Tatler’ (1931), ‘Time’ (1933), ‘Daily Mail’ (1933), ‘Volante’(1933), ‘Magestic’ (1934), ‘The National Geographic Magazine’ (1939), ‘Daily Telegraph’ (1939) and ‘The Sphere’ (1939). It is only fitting to also refer to the Swiss press (1939). Publicity also extended to English and German television (1934). (Ferreira, et al, 1985, pp. 19-20).

In 1937 a Tourism Delegacy of Madeira (Delegacao de Turismo da Madeira) was implemented in the island. The policy for tourism was officially managed by the Tourism Delegacy, an organisation depending of the Council of Tourism and regionalized in 1978, became an organisation with autonomy and power as a consequence of the devolution.

Madeira is now catering for a new type of visitor looking for more active holidays than traditional tourists namely windsurfing, scuba diving, game fishing, tennis and golf. Moreover the Regional Tourist Secretary is supporting big events as an animation policy like Christmas and New Year festivities, the Wine Festival, Flower Festival, Apple Festival, Carnival and Car Rally (Rally Vinho da Madeira). According to Farrow and Farrow (1990) in 1983 a questionnaire given out by the Tourist Office asked visitors what they liked most about Madeira: 35.7 per cent of respondents said natural beauty; 13.6 per cent the friendliness of residents; 12.4 per

cent the climate; 8.4 per cent good hotels and 7.8 per cent the flowers. They were also asked what they liked least about Funchal: 31.7 per cent said the pollution and 15.8 per cent the noise and confusion in the city.

From the previous period onward, tourists from middle and up market, from diversified generating countries, disembark on Funchal. It is the era of sportive, intellectual, congressional, universitarian, academic, political (national and foreign) tourism, that chooses Madeira as a setting for excursions, congresses, games, and simultaneously, for leisure tourism, and includes retired people and those whose economical and social spending power (Ferreira et al, 1985).

These groups come to the island in search of the exotic, the different. The aforesaid social tableau remains unaltered till the present, with slight differences during the sixties, a period when the Portuguese middle-class acquired the habit of travelling taking an interest of the nationalist theme: 'There is always an unknown Portugal waiting for you' (Ferreira, et al, 1985, p.20). In addition there has also been a change in the attitudes of the Madeirans towards holidaymaking. Porto Santo, as a smaller island, 15 minutes away by plane, has an 8 km beach with white sand, and is the most population for the Funchal population to visit.

2.7.1 Tourism Product: An Overview

According to (Tur-Do, 1998) to cement Madeira as a tourist destination in Europe is the objective defined for tourism sector in 1998. At the turn of the century, tourism is the most important economic sector and the largest industry in the region. The number of hotel facilities has increased steadily over the past twenty years and there are approximately 19,000 beds distributed throughout 155 hotel units. Figure 2.5 shows the evolution of bed capacity from 1993 until 1997, according to DTR 97.

Bed capacity

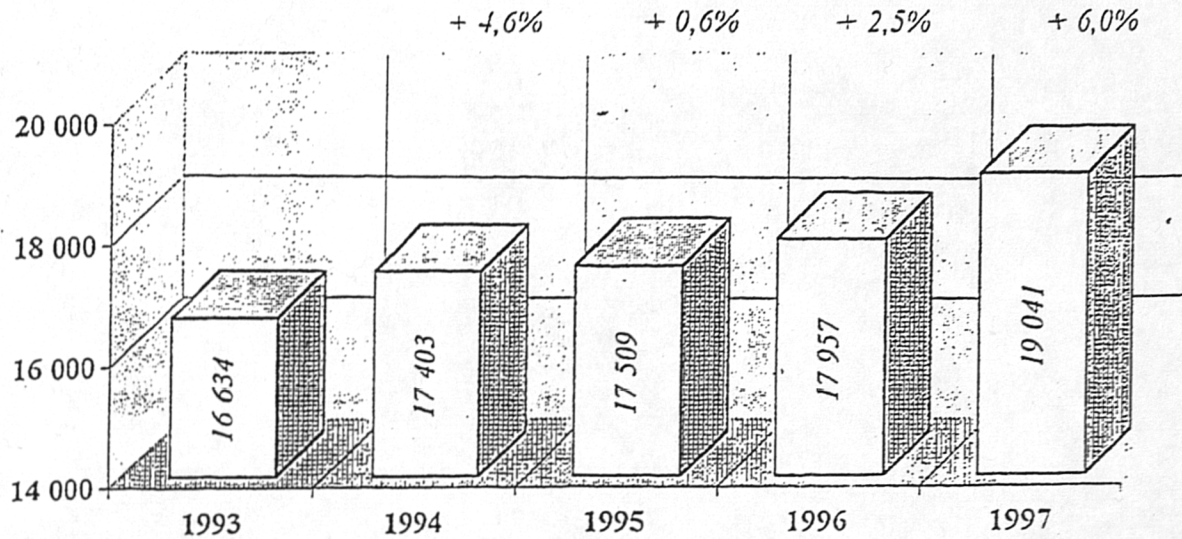


Figure 2.5 Bed Capacity in Madeira

Source: DRT, 31.12.97

Around 13,000 beds are concentrated in Funchal, and the remainder are divided among the rest of ten municipalities. As can be seen in Figure 2.6 there is a huge concentration of bed capacity in Funchal. The hotel industry employs 5,000 workers directly, and it is estimated that there are 15,000 jobs, which are derived from the tourist activity, corresponding to approximately 15% of the workforce. The contribution of the sector to GDP is about 10%. Moreover, the same official document (Tur-Doc, 1998), states that there are several objectives in the strategy for development, which were defined by The Regional Government. They are:

- To achieve an annual increase of 4-5% in the capacity for accommodation, within a framework of sustained growth, seeking not to overcome 20,000 beds by the year 2000, maintaining at the same time, the balance between supply and demand;
- To guarantee the quality of the environment, with incentives for decentralisation of accommodation into non-urban areas;
- To attract a more upmarket clientele, avoiding mass tourism and emphasising certain niche markets, such as ecotourism, adventure holidays, golf and congresses.

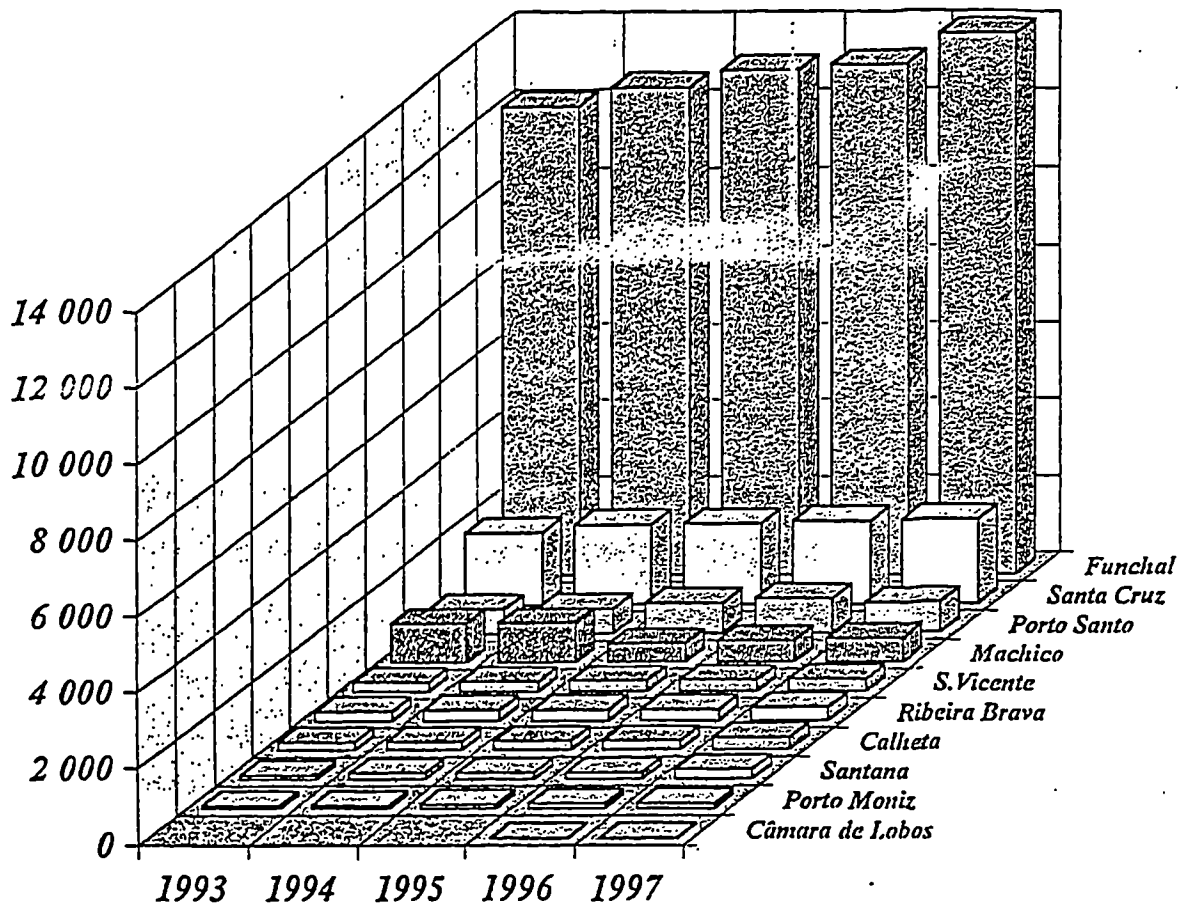


Figure 2.6 Geographical Distribution of Beds

Source: DRT, 31.12.97

There have been a growing number of tourists. Figure 2.4 shows a steady increase of tourist arrivals and Table 2.5 presents an evolution of the number of tourists to Madeira from 1993 to 1998, considering their country of residence.

Furthermore, according to a paper of 5 May 1999, and personal communication from the Regional Director, after the new millennium the island could receive about 900,000 tourists per year. According to the same source (1999), the bed capacity until the end of 1999 is 22,000 with a forecast of 24,000 to the year 2000. In addition, the Regional Government defines 28,000 beds as the balanced limit to the island.

	1993	1994	1995	1996	1997	Difference % 1993			
						1994/93	1995/93	1996/93	1997/93
Germany	67,089	91,002	118,844	132,683	130,247	35.6	77.1	97.8	94.1
Austria	5,417	10,420	13,998	15,740	18,535	92.4	158.4	190.6	242.2
Belgium	9,520	12,882	16,661	16,588	15,318	35.3	75.0	74.2	60.9
Brazil	1,232	1,630	1,757	2,089	2,399	32.3	42.6	69.9	94.7
Canada	2,107	2,511	1,545	1,295	1,139	19.2	-26.7	-38.5	-15.9
Denmark	10,609	12,432	13,775	18,747	19,044	17.2	29.8	76.7	79.5
Spain	18,464	21,907	15,308	15,064	15,470	18.6	-17.1	-18.4	-16.2
EUA	5,680	7,221	5,317	5,090	4,504	27.1	-6.4	-10.4	-20.7
Finland	9,455	10,211	14,707	16,573	17,267	8.0	55.5	75.3	82.6
France	19,547	21,243	27,876	26,750	28,716	8.7	42.6	36.8	46.9
Greece	1,355	1,406	1,330	1,345	2,020	3.8	-1.8	-0.7	49.1
Holland	9,015	11,669	18,696	20,031	20,993	29.4	107.4	122.2	132.9
Ireland	803	752	1,004	1,145	1,315	-6.4	25.0	42.6	63.8
Israel				1,778	816				
Italy	3,898	4,826	5,106	6,022	6,152	23.8	31.0	54.5	57.8
Japan	316	407	461	519	500	28.8	45.9	64.2	58.2
Luxembourg	683	281	437	554	2,509	-58.9	-36.0	-18.9	267.3
Norway	6,918	10,307	11,528	12,593	11,384	49.0	66.6	82.0	64.6
Portugal	103,776	110,642	112,094	117,026	120,495	6.6	8.0	12.8	16.1
United Kingdom	91,246	99,771	110,195	112,731	121,878	9.3	20.8	23.5	33.6
Russia				723	1,170				
Sweden	21,688	23,034	25,342	26,420	29,745	6.2	16.8	21.8	37.1
Switzerland	6,176	7,220	9,442	10,679	10,839	16.9	52.9	72.9	75.5
Other	4,129	4,266	5,018	3,522	3,972	3.3	21.5	-14.7	-3.8
Total	399,123	466,040	530,441	565,707	586,427	16.8	32.9	41.7	46.9

Table 2.5 Evolution of Tourist Arrivals to Madeira by Origin of Residence

Source: DRE, 31.12.97

Funchal Airport

Visitors usually come to Madeira by air, but sea travel is also used. Cruise ships quite often dock in the harbour of Funchal. Funchal airport is at present, being enlarged and is one of the vectors of the development strategy for the island. By the end of 2000 it is expected the airport will have an extended runway of 2,781m from its present length of 1,800m and a passenger terminal capable of handling 3.5 million passengers per year. The estimated cost of this construction is US\$450m. The European Community contribution towards this project amounts to 227,400,000 ECU's made up of the following:

FEDER	67,400,000 ECU
Cohesion Fund	160,000,000 ECU (ANAM)

The airport's new capacity to receive larger aircraft, including the Boeing 747, will make Madeira more competitive as a tourist destination.

Shopping

Commerce is one of the most developed activities. The huge variety of regional products range from Madeira wine, handicrafts including wicker furniture, traditional boots and caps, blankets, embroideries and dresses, tropical fruits and flowers.

Restaurants and Bars

Along with traditional Portuguese cuisine and international menus, there is Madeiran gastronomy. Fish specialities, which are typically regional, are dishes with scabbard fish, limpets, tuna and octopus. As far as meat is concerned, the menu includes 'Espetada' (beef on a skewer), and 'carne de vinha d'alhos' (pork marinated in wine and garlic), and also tropical fruit.

People and their Culture

Along with hospitality and kindness, visitors can enjoy Madeira folklore. There is a cultural heritage of more than 500 years with influences from northern Europe, namely Flanders and Great Britain. Also churches and chapels with architectural beauty and carved altars and other items of religious art should be noted.

Porto Santo

As mentioned before, 15 minutes from Madeira by plane or two and a half hours by boat, lies the island of Porto Santo. With a different landscape, this island is a tourist asset, which has not been 'very greatly exploited':. There is a 9km long sandy beach, with a climate where it is possible to have a beach holiday all year round.

Desertas and Selvagens

The Desertas and the Selvagens are a good asset, both in patrimony and environment. Their 'population' consists of colonies of sea wolves and rare birds, which are

protected by the Madeira Natural Park. The European Council classifies these islands as a biogenetic reserve.

2.7.1.1 Tourist Product Mix

According the official document (Tur-Doc.1998), Madeira is currently developing a promotional campaign and image which aims at keeping its traditional markets and, at the same time, creating a new demand. Some new market and product niches have been defined. They are:

- *Mountains and Walks: Ecotourism*

With awareness of the environmental concerns, the Region has defined environment as a policy priority, thus two thirds of its territory has been set aside and is legally protected as a Natural Park. Many walks follow 'levadas', small watercourses built for irrigation purposes, 'veritable veins' which criss-cross the island in all directions. The 'levadas', are considered a true heritage. Furthermore, to this type of demand, small hotels with more personalised and family oriented service, have emerged in rural areas and old family houses have been restored and adapted for tourism purposes. Small inns and hotels, respecting the traditional architecture and the environment, have also been built.

- *Congresses and Incentives*

Besides the multi-purpose spaces which already existed in the 4 and 5 star hotels, since March 1997, Madeira offers a new and adequate structure - The International Fair and Congress Centre of Madeira. The Congress Centre provides diverse equipment and services, including video-conferencing equipment and an internal television circuit. The Congress Centre has a multi-purpose auditorium, which can hold 700 people and eleven meeting rooms, with capacities from 70 to 340 people. This new structure has, furthermore, an Exhibition Centre of around 5,000m², inaugurated in September 1996. A submarine network of fibre optic cables linking Madeira to Europe, Africa and America provides international communications from the island. Satellite links give Madeira the automatic connections with the whole world and there is access to data transmission networks and Internet. As a

consequence, Madeira offers conditions, as a destination, for holding international meetings and conferences.

- *Sports and Golf*

The mildness of the climate and the joint presence of sea and mountains, with the availability of equipment and services allows Madeira to offer a range of sporting and leisure activities throughout the year.

The water enables niche products such as nautical sports and swimming, diving, sailing, canoeing, water skiing, and parasailing to be offered. Another sport, which has adequate conditions, is deep sea and open sea fishing due to the abundance and quality of various species of the tuna family, especially blue marlin. In addition, the region sponsors the annual Madeira Blue Marlin Tournament, every August. The mountains provide stimulating cycle routes, as well as climbing and walking. There are two 18-hole golf courses and the Madeira Open golf tournament, is part of the European PGA tour. In addition, Madeira offers infrastructures for football and sports training camps.

2.7.1.2 Tourist Attractions

The region has been developing a calendar of attractions attempting to provide visitors with festivals, events and entertainment throughout the year. The most important events and attractions are:

- *Carnival*

The Carnival Festival seeks to preserve its popular roots. Various groups and samba schools participate and fill the main streets of Funchal. There is an atmosphere of effusive enjoyment with creativity and imagination.

- *Flower Festival*

Every year in April the festival is considered a homage to Madeira's flowers. It is a 'dazzling festival' which includes a parade of floats, which crosses through the main streets of the capital and shows off the variety and multiplicity of the floral species of the island.

- *Music Festival-Musical Weekends*

These festivals are concerts of classical music and take place in June at the Baltazar Dias theatre.

- *Madeira Wine Festival*

This festival is held during the second week of September 'when the vintage begins all around the island'. The region has intended to recreate and reconstitute the population old habits. This festival is attended by residents and tourists alike in Funchal; there are various shows of lights, sounds and folklore which allude to the wine and the vintage.

- *Philharmonic Band Festival*

When the popular and religious events of the summer are over there is an interesting gathering of the philharmonic bands which perform at all these traditional festivities. The festival takes place in Ribeira Brava generally in October, including classical, contemporary and popular repertoires.

- *End of the Year in Madeira*

The Christian traditions of Christmas time mix with manifestations, celebrating the arrival of a New Year. The programme of events of a cultural, ethnographic and artistic nature takes place in all the month of December and extend to Epiphany (January 6th). To quote Tur-Doc. (1998, p.7): 'The special conditions of Funchal's amphi-theatre transform it into a giant cradle, lit by more than 250,000 coloured lightbulbs and offer a scene of unusual beauty for the contemplation of the visitors'.

2.8 Planning Policy

A master plan, Plano de Ordenamento Turistico (POT), specific for tourism was announced in May 1999. The main objectives for sector planning were to:

- re-evaluate the tourist activity in the region;
- increase the quality of macro and micro tourist regional products;
- redefinition of visitors profile;
- better analysis of the changes in the international tourism market;
- support and evaluate natural and landscape tourism opportunities.

The POT will be completed in ten months. The preliminary works, initiated during May 1999 should be finished in March 2000. The tourism plan starts with:

1. Diagnosis of the present situation.
2. 'Scenarios' of tourism development.
3. Plan report, cartography, action programmes and criteria for the planning of tourist zones.

Due to its climatic conditions, infrastructures, telecommunications technologies, people and tradition of quality of service, safe and stable social and political conditions, environmental quality, planning, promotion and general tourism policy, and knowledge policy, Madeira is preparing to face the challenges of the 21st century. Regional autonomy is an increasingly important part of both the central and the regional government's commitment. This is considered an opportunity for a variety of voluntary and community sector groups. It is also an opportunity and challenge for the tourist sector and the residents of Madeira to utilise their knowledge and experience in order to influence specific issues and directions.

This chapter highlighted the main features of Madeira as a tourist destination, emphasising the island as a tourist product. Tourism policy elaboration was described in a specific plan for Madeira. The chapter also noted the geographic fact of an island open and exposed to the world as a good asset for the future.

In the next chapter the social impacts and consequences of tourism are reviewed and discussed.

CHAPTER 3

TOURISM SOCIAL IMPACTS

3.1 Introduction

This chapter is divided into three parts. The first part outlines the social impacts of tourism. The second part emphasises cultural impacts of tourism. The third part is an attempt to position tourism as a science, with an epistemological consistency without forgetting its nature as a business and a service product industry.

The study of the impacts of tourism on residents has concerned theorists, researchers and practitioners, emerging from a broad range of disciplines and interests from the 1970s onwards. As a consequence the tourism impact literature 'is both expansive and diverse' (Gilbert and Clark, 1997).

Most of the early studies of the impacts of tourism have been restricted to economic analysis and described the benefits, financial position and employment which accrued to destinations as a result of the positive impacts of tourism (Pizam, 1978; Mathieson and Wall, 1982). However, in recent years several studies of tourism have pointed out the existence and importance of sociocultural impacts and its negative effects on the local residents of the destinations. These studies contend that tourism might have negative social, environmental, psychological and economic consequences on the resident population (Young 1973; Butler 1974; Pizam 1978; Mathieson and Wall 1982). Following Pizam (1978, p.8): 'These negative impacts have occurred in three different domains:

- Physical and Environmental (overcrowding, reduction in accessibility, increase in population density, etc.)
- Economic (land price inflation, employment fluctuation, economic dependence on a single industry, etc.)
- Social (introduction of undesirable activities such as prostitution and gambling, excessive concern for material gains, loss of cultural identity, etc.) having been negatively affected by tourism, the local residents retaliate exhibiting hostile behaviour toward the tourist'.

According to Mathieson and Wall (1982), research on the social and cultural impacts of tourism can be seen in three categories: the tourist, the residents and the tourist-residents interrelationships. This research is concerned, mainly with issues dealing with the latter two categories, emphasising the point of view of residents and their attitude to tourism, trying, on the other hand, to explore their views about tourism policy decision making in Madeira island. Following Mathieson and Wall (1982) there are several studies focusing on the sociocultural impacts of tourism, including the Pacific islands (Farrel 1977; Finney and Watson, 1970), Bali (Francillon 1975; Mckean 1976), Spain (Greenwood,1972), East Africa (Ouma, 1970), and the Caribbean (Bryden 1973 ; Perez 1975; Lundberg 1974), De Kadt (1979), however have given 'a succinct statement on the topic which draws together the findings of the other authors' (Mathieson and Wall, 1982, p.133). In addition, Mathieson and Wall summarised the volume of literature, which specifically examines the social impacts of tourism into one of two types: colourful stories and specialised academic articles. Most of them claimed are mainly descriptive and with a shortage of a consistent theoretical support or analytical foundation. They noted (1982, p.137): 'The literature which examines the sociocultural impacts of tourism has usually been directed towards either social or cultural aspects. Using these terms very loosely, the social studies usually consider interpersonal relations, moral conduct, religion, language and health, whereas cultural studies consider both material forms of culture and processes of cultural change'. Furthermore, they argue there is no clear distinction between social and cultural phenomena but this dichotomy has been useful in the organisation and categorisation of knowledge (1982).

3.2 Social Impacts of Tourism - An Overview

Social impacts of tourism, as stated before were until recently, an underestimated area of research, but there is evidence that the issue is becoming increasingly popular, with a foregoing body of studies dealing with resident attitudes to tourists and tourism. Mathieson and Wall (1982, p.137) observe: 'social impacts of tourism refer to the changes in the quality of life of residents of tourism destinations', suggesting two main frameworks for the measurement of social impacts. The first one was developed by Doxey (1975) named 'A Causation Theory of Visitor-Resident Irritants; Methodology and Research Inferences'. This comprised two

research projects conducted at different destinations - Barbados, West Indies, and Niagara on the Lake, Ontario - with similar methodology, which 'have been used to arrive at certain conclusions which hopefully will provide planners with the tools needed to measure and monitor "irritations" which stem from the impact between residents and outsiders at any given tourist destination area' (Doxey, 1975, p.195). Doxey (1975) points out that impacts between visitors and residents may create varying degrees of residents attitudes ranging from euphoria, apathy, annoyance and antagonism, according the number of tourists and the threats towards the way of life of residents. Doxey also indicates that the responses of residents in different destinations change with the amount of contact, such as the responses of visitors, due to several factors. Doxey (1975, p.195), says: 'Nor can we assume that irritations will arise only because of the ratio of visitors and residents as some suggest, or cultural or ethnic backgrounds. In the minds of the residents, the outsider represents a challenge to the life style of the destination. At the root of this therefore, is the value system of the destination, and it is this which we must investigate before we can proceed with planning. There is no 'typical' tourist, nor homogeneous destination. We become consequently concerned with the spill over effects, real or illusory, of interpersonal relationships, in this case, of visitors and residents'. Moreover, Doxey suggests a final stage 'in which people have forgotten what they cherished and the environment is destroyed' (Mathieson and Wall, 1982, p.138). In addition Doxey suggests a methodology with three phases: problem identification; research procedures and data analysis and interpretation pointing out: 'In the final analysis, the success of any methodology, indeed any interface research investigation, will depend on the harmonious blending of all the above elements' (Doxey,1975, p.197). In Niagara on the Lake, it was clear that the number of visitors, he contends, 'were altering, adversely, the life pattern of the town'.

A framework presented by Bjorklund and Philbrick (1972, p.8 found in Butler, 1974, p.12, cited by Mathieson and Wall, 1982, p.139) to analyse what can happen when two or more culture groups have contact has been suggested by Butler (1975, p.89) a useful tool for understanding the contacts between tourists and residents. Figure 3.1 shows the matrix, which support the framework..

As Mathieson and Wall (1982, p.139) comment: 'The attitudes and behaviour of groups or individuals to tourism may be either positive or negative, and active or passive, respectively. The resulting combinations of reactions to tourism may take one of four forms as shown in the diagram. Within any community, all four forms may exist at any one time but the number of people in any one category need not remain constant'.

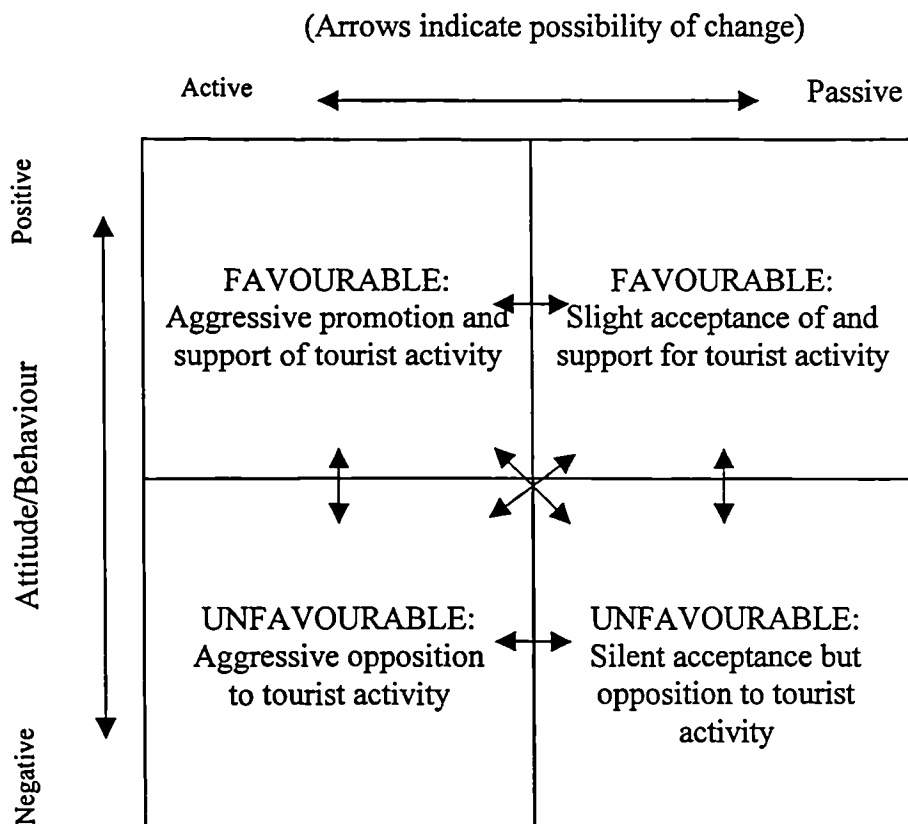


Figure 3.1 Host Attitudinal/Behavioural Responses to Tourist Activity

Source: Bjorklund and Philbrick, 1972, p.8 found in Butler, 1974, p.12 and quoted in Mathieson and Wall, 1982, p.139

The arrows indicate possibility of change: attitudes, circumstances and tourism. Following Mathieson and Wall (1982, p.140) 'The above frameworks are similar in that they incorporate a dynamic element assuming that social impacts will change over time. However, they differ in their conceptions of the directions in which change may take place. Doxey assumed that change is unidirectional whereas Butler's framework allows attitudes and behaviour to change in a variety of directions. Furthermore, the scale of the frameworks is rather different. Doxey's

framework is to be applied to the prevailing mood of a resort in its entirety. On the other hand, Butler's framework examines groups and individuals within a single resort. It recognises that there may be different attitudes towards tourism within a resort and these may lead to tensions and even political pressures between different groups in that resort.' In addition the same authors argued that the frameworks are lacking empirical evidence, despite being useful tools in portraying relevant social and cultural impacts issues.

3.3 Pragmatic Choice of Social Impacts Issues

Mathieson and Wall (1982) have identified salient points for the discussion of social impacts. They are as follows:

- Tourism and social change: euphoria to xenophobia;
- Conditions for resentment: the physical presence of tourists; the demonstration effect; neo-colonialism;
- Tourism and moral conduct: prostitution; crime; gambling;
- Religion;
- Language;
- Health.

This time Mathieson and Wall (1982) represented the state of the art as far as social and cultural impacts are concerned. For this reason the way they summarise the subject at hand deserves to be quoted (1982, pp.157-158): 'Social impacts of tourism were, until recently, a neglected area of study but there are signs that the topic is beginning to attract increasing attention. There has been a recent spate of studies of host attitudes to tourists, such as those undertaken by Knox (1978), Thomason et. al., (1979) and Pearce (1980), as well as discussion based primarily on personal experience, for example, Cheng (1980). Most of these works have a poorly developed conceptual basis and they tend to emphasise the negative social effects of tourism. However, evidence has been gathered from such diverse places as Thailand (Cohen, 1979) and Colombia (Belisle and Hoy,1980) that tourism may not always be as destructive as was first thought. The issues which have been examined in this part of the book indicate the need for a more explicit account of

the non-economic effects of tourism accruing to members of host communities. An examination of the effects of tourism on culture reveals similar results'. Following the same authors one can highlight the body of literature on social and cultural impacts of tourism showing that the development of tourism does not always carries out benefits to residents. It can even emphasise further problems and create new ones. Until recently most people had in mind that mass tourism was 'the good'; now an active and excitable contention has arisen. The effects of tourism which are most conducive to the homogenisation of societies are:

- the overcrowding of infrastructures and facilities, which tourists share with residents;
- the demonstration effect;
- the employment of non-local in upper occupations;
- the increase of undesirable social activities: prostitution, gambling, crime;
- the deterioration of indigenous language and culture.

There is a coincidence between growth of tourism and social and cultural changes. To what extent is tourism responsible for these changes is another question. On the other hand, and quoting Mathieson and Wall (1982,p.175): 'It is also uncertain if the sometimes contradictory findings revealed in the case studies can be extended to other destinations, under different conditions, and with different types of tourist development. Future research must not only extend the work which has already been done, it must also seek to identify and examine social and cultural impacts which have yet to be studied'. Some of the effects are presented in Table 3.1.

Impact Categories	Impact Indicators
i) Demographic structure	Age/sex structure, migration, resident displacement, population density and composition.
ii) Social amenities (perceptions of facilities and services)	Transportation, educational facilities, freedom of choice, preservation of lifestyle, participation versus alienation.
iii) Institutional memberships	Religious groups, social clubs, civic groups, political and sporting groups.
iv) Personal safety and privacy	Quality of police standards, crime rates, time spent with family.
v) Psychological features	Psychological stress, work satisfaction, self-expression, mobility, national or community cohesion.

Table 3.1 Impacts and Indicators

Source: Mathieson and Wall, 1982, p. 175

3.4 Cultural Impacts of Tourism - An Overview

This part examines cultural effects of tourism and also the effects of cultural tourism. Cultural effects of tourism involve changes in the culture as a consequence from the presence and activities of tourism and tourists. Cultural tourism is a component in the attractiveness of a tourism region considered as a tourist product. Ritchie and Zins (1978, p.257, quoted by Mathieson and Wall, 1982, p.159) isolated twelve elements of culture attracting tourists to destinations:

- 'Handicrafts;
- Language;
- Traditions;
- Gastronomy;
- Art and music, including concerts, paintings and sculpture;
- The history of the region, including its virtual reminders;
- The types of work engaged in by residents and the technology which is used;

- Architecture giving the area a distinctive appearance;
- Religion, including its visible manifestations;
- Educational systems;
- Dress;
- Leisure activities.'

Research into the cultural impacts of tourism is concentrated upon three major forms of culture, which attract tourists:

- 'Forms of culture which are inanimate or which do not directly involve human activity. Tourists visiting places of unique architecture and art, historical buildings and monuments, and purchasing traditional arts and crafts are notable examples;
- Forms of culture reflected in the normal daily life of a destination. Visiting 'foreign' peoples to observe their normal social, economic and leisure activities in an attempt to understand their lifestyles, ideologies and customs in a common tourist motivation;
- Forms of culture which are especially animated and may involve special events or depict historic or famous occurrences. Examples include musical festivals, carnivals, festivals reflecting old traditions and behaviour, re-enactments of battles and displays of old machinery' (Mathieson and Wall, 1982, p.159).

3.5 Pragmatic Choice of other Cultural Impacts of Tourism Issues - Themes

- Tourism and processes of cultural change: acculturation and cultural drift;
- Intercultural communication and the marketing of culture, or culture expressed as a commodity - tourism and material forms of culture;
- The renaissance of traditional art forms;
- The deterioration of traditional forms;
- Tourism and non-material form of culture;
- Cultural arrogance.

This is not the place for a detailed account on cultural impacts but a balance should be made. De Kadt (1984, pp.14-15) has stressed a summary of the cultural impacts of tourism:

‘The frequent charge that tourism contributes to a degeneration in this field appears, however, to be an exaggeration. Even though curio production, ‘airport art’, and performances of fake folklore are of course stimulated by tourist demand, the seminar papers and discussions brought to light that frequently arts, crafts, and local culture have been revitalised as a direct result of tourism transformation of traditional forms often accompanies this development but does not necessarily lead to degeneration. To be authentic, arts and crafts must be rooted both in historical tradition and in present-day life; true authenticity cannot be achieved by conservation alone, since that leads to stultification’.

Meanwhile on one hand tourism contributed to the rehabilitation and promotion of cultures, but this depends on the type of tourism development. On the other hand if the social and cultural impacts of tourism on residents are relevant however, they are difficult to quantify and further theoretical and empirical research is required, overcoming the descriptive stage. This research is directed more explicitly at assessing the attitudes of residents towards tourists and tourism. A growing and promising amount of studies, involve surveys of resident attitudes to better examine their views about tourism development.

Following De Kadt (1984,p.16) ‘Whatever the means chosen, the success of that development still depends at least in part on an assessment of the impacts it is likely to have. In this context a number of different host country situations may be distinguished’. Each country is unique in its geography, resources, stage of development and political organisation. (De Kadt, 1984). Relevant also, is its size, level of development, population and its density. In small countries, especially islands, tourism development may put pressure on resources, environment and residents. However, despite the complexity of these issues De Kadt (1984), presents some generalisations and recommendations:

- small countries with a lack of production facilities and infrastructure and shortage of skilled people, are likely to experience more negative sociocultural impacts than larger and more developed countries;
- resource-poor islands are the ones that may have most difficulty in choosing development strategies option which do not rely heavily on tourism;
- the negative sociocultural impacts should be reduced if the growth of facilities and infrastructures is neither rapid nor too much massive, and if residents have time to be involved within a gradualist approach, mainly for small countries;
- the notion of tourist carrying capacity is worthy to be developed, as an instrument for planning, management and policy;
- there is a need for developing a taxonomy of tourists and residents for helping predictions about impacts and to serve as a support for planning;
- data on types of tourists are insufficient.

If tourism planners make pressure for more information, the data will be expanded.

3.6 Literature Review of Sociocultural Impacts

Duffield (1982) advocates the need to consider the impact of tourism both as an economic and social activity, when assessing the impacts of tourism developments. He suggests factors taken into account for measuring such impacts, 'which derive from the nature of the tourism activity, e.g., tourism is a dynamic agent of change, it is an amalgam of a number of industrial activities, it occurs within distinctive contexts etc. The question therefore centres on the methodology employed to measure the distribution of the costs and benefits of tourism' (1982, p.248). He contends the impacts of tourism developments have both structural changes and what Doxey calls dimensional changes, i.e., the impacts that occur from ever increasing numbers of tourists within a destination. This distinction is of paramount importance for recognising tourism as an agent of change. In addition whilst the economic costs and benefits of tourism include only 'tangible elements' that can be measured, there is another important aspect of impact - the social costs and benefits - which are both difficult to measure and difficult to control by local authorities. Moreover, as Duffield (1982, p.253), points out: 'The social impact of tourism is largely under-researched, and compared with studies of its physical and economic

impact, social impact assessment has come late to the agenda'. He considers the perceptions of impacts depend on one's point of view, or, one's involvement in the tourist industries, citing a study of Pizam (1978). The variables taken into account (Duffield, 1982) were:

- availability of land housing;
- cost of land housing;
- traffic conditions;
- availability of recreation facilities;
- job opportunities;
- employment fluctuations;
- increased incomes;
- shopping opportunities;
- increased prices;
- noise;
- litter;
- standard of living;
- vandalism;
- understanding different people;
- changes in values, norms ,etc.

Duffield (1982), concludes, after reviewing the social and economic impacts of tourism and highlighting the dilemma of arbitrating on the costs and benefits, between the interests of tourists and local residents, arguing that 'an increase in wealth *per se* is insufficient unless those benefits accrue at all levels of society. It is important to ask not only how much benefit flows from a particular economic activity, but also who benefits from the wealth generated' (1982, pp. 254-255). Moreover he defends, 'in order to achieve optimum levels of tourism development [in accordance with community objectives], decision-makers must have in mind that certain components require sub-optimisation' and 'it is important to assess the role of tourism in terms of local perceptions of costs and benefits' (Duffield, 1982, p.225).

Travis (1982), notes that the stage of development of tourism management as a discipline may be associated to the claims of the tourism industry as a pressure group 'and the lack of adequate academic attention to the economic disbenefits and the environmental and sociocultural costs-benefits of tourism' (Travis, 1982, p. 256). He advocates a social-theory for tourism, criticising that in most conferences on tourism, and in most writings 'a value system is evidenced by the three-fold obsessional showing of: (a) the economic benefits of tourism; (b) the constructive and valuable role of the tourist industry; and (c) how to invest in more tourist development. As a marginal sop the socio-cultural as well as environmental impacts are briefly mentioned' (Travis, 1982, p.257). Furthermore he contends tourism is unnecessarily placed at risk because the core theory about tourism is left at a 'primitive level', and to the need of establishing the nature of tourism, its motivations, its impacts 'to see how far they can be managed, with net benefits to the hosts, and to the tourists themselves through their travel experience' (Travis, 1982, p.257). In addition he considers the examination of social, cultural, physical and psychological needs in leisure and tourism are on the agenda, as such as the tourist cultures and their adequacy with residents environments and cultures, with which they correlate. On the other hand he suggests: 'If the theory of tourism is to mature, then we need to see how tourism is to give not only net benefits both to tourists and to local or regional communities which act as hosts to tourism, but also how far a comprehensive balance-sheet can be drawn up. Such a balance-sheet must address the net sociocultural and environmental benefits of tourism, as well as the cruder net economic benefits (or net costs) which shape them' (Travis,1982, p.257). Pearce (1989, p.217) writing upon this issue quoted Lundren, who emphasised that 'the social impact of tourism will vary according to the difference between the visitors and the visited, weather in terms of numbers, race, culture or social outlook'. Moreover (Pearce, 1989), suggests that special characteristics of tourism must also be considered, such as the transitory nature of the relationships between residents and guests; the tourist as an holiday maker and residents are at work; the seasonal nature of much tourism and the fact that 'outward signs of tourism may be more manifest than other types of development; for example, agricultural reform or the introduction of television. As a result, effects which have their origins elsewhere may be attributed to tourism. At worst, the industry

may become the general scapegoat for any and every social malaise' (Pearce, 1989, p.217).

Travis (1982) adverts for the possibility of both several host cultures and several tourist cultures at one place, at one point in time, and as a consequence one cannot see cultural impacts in monolithic terms. He contends that the stage of social, economic and political development of receiving societies, whether its relationship is primarily domestic or international is a main determinant. In this way (Travis, 1982, pp. 259-260) points out: 'Far too often, newly independent developing countries, which may formerly have had a colonial status, find themselves again in a complex social and economic relationship with Europeans, who return as tourists'. Some authors called this phenomenon as neo-colonialism within a framework of dependency theory. A listing of some costs and benefits associated with the sociocultural impacts of tourism is presented in Table 3.2.

Benefits	Costs	
<p><u>A Social</u></p> <p>Increased knowledge of host culture by visitors. Awareness of its music, cuisine and arts, and possibly language(?).</p> <p>Improved reputation and visibility of host community to outsiders.</p> <p>Increase social contacts, new ideas, new values, new ways of life</p>	<p>Host culture debasement</p> <p>Unacceptable rate and scale of culture conflicts and change.</p> <p>Rich visitors come to poor communities, creating tension.</p> <p>Pressures to change social values, dress, mores, habits and behavioural norms</p>	<p>Damage to cultural systems and to cultural resources. Minority languages at risk.</p> <p>Cultural commercialisation and commodification of society.</p> <p>Folk art becomes airport junk art.</p> <p>Deeper values and ideals at risk</p>
<p><u>B Host Culture</u></p> <p>Develops because of demand for traditional entertainment, demand for traditional art, crafts and music</p>	<p>Loss of original state and stability.</p> <p>Loss of cultural price.</p> <p>Status relationship between host and guest cultures changes</p>	<p>Consumption changes.</p> <p>Introduction or expansion of gambling, prostitution, drunkenness and other excesses; vice and drugs, theft and petty crime.</p>

Table contd.....

<p><u>C Enriching Role of Visitors</u></p> <p>By provision of services amenities and facilities not otherwise available to hosts – and social and activity choices therefore arising.</p> <p>Education and learning aided.</p> <p>Boost for heritage protection, interpretation and management.</p> <p>Increased social range and experience.</p> <p>Cultural interchange, peace and understanding.</p> <p>New experiences, new ideas, new cultures</p>	<p>Short term and transient social relationships with visitors are not real and meaningful links.</p> <p>Increasingly mass entry of visitors makes contact diminish and relationship meaningless.</p>	<p>Misunderstanding. Hostility, debasement. Diseases introduced.</p> <p>No visitor understanding or knowledge of their hosts, their culture and language</p>
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Table 3.2 Costs and Benefits from the Sociocultural Impacts of Tourism

Source: Travis, A.S., 1982, p.260

As can be seen the cultural impacts of tourism on residents suggest the opportunity for problems and Travis (1982) puts the need for managing the impacts and consequent tourism policy can be summarised as follows:

- the stage of development of a society hosting tourism is relevant for examining its values, legislation, institutions, controls and incentives in order to maximise benefits and to minimise costs or disbenefits;
- importance of planning;
- ecological planning philosophy;
- conservation, cultural and educational policies;
- standards for the quality of services;
- consumer protection;
- economic policies, social policies and environmental policies.

As a consequence Travis (1982, p.262) highlights as a broad aim to host populations that: ‘small host societies may try to find ways of managing the sociocultural impacts of tourism, fighting to retain what they see represents the integrity of their own system of values, in a changing world’.

Erisman (1983), argues that traditionally, dependency has been considered as an economic and/or political relationship whilst he suggests instead the concept of cultural dependency indicating tourism as a possible agent and facilitator of cultural dependency in the West Indies probing in the process, the interface between cultural and economic/political dependency. After examining four 'implicit theories' from the tourism literature - trickle down, commodization, back servility and mass seduction – he recommends the application of a commodization/mass seduction synthesis for future research 'to generate hypotheses which if empirically verified, will represent not only a contribution to dependency theory and tourism studies in particular, but also to international relations in general' (Erisman, 1983, p.337). The same author, contends 'that what needs to be done is to formulate hypotheses empirically verifiable to answer such questions as:

- a) To what degree have West Indian socialisation processes been infiltrated by Americans norms and values?
- b) How and to what extent has tourism been as a trigger for or agent of such infiltration?
- c) How effective have these infiltration socialisation processes been in inculcating residents as a whole with cultural dependency?' (Erisman, 1982, p.360).

After these questions the same author concludes and suggests: 'While the capacity of all the approaches discussed here to furnish adequate replies should be examined, it seems that a commodization/mass seduction synthesis is likely to be most productive and therefore should receive first priority. Before too long, it may finally be known whether mass tourism in the Antilles is indeed whorism or just a little harmless flirting' (Erisman, 1983, p.360).

Graefe et. al., (1984) review research over the past twenty years dealing with social carrying capacity. Emphasis is given to integrating the diverse literature within a conceptual framework, which help to investigate the complexity of visitors' experience evaluations. Implementation of social carrying capacity is also

analysed, emphasising the importance of scientific information and critical management judgements to a given destination. In spite of being explained from the point of view of visitors, the paper attempts to provide new perspectives on social carrying capacity, putting all variables connected to the evaluation of quality recreation experiences within the framework of social carrying capacity. To quote Graefe, et. al., (1984, pp. 422-423): 'This approach recognises that there are several types of impacts that can result from increasing use levels and that these impacts are interrelated and influenced by a variety of factors. Thus, there is no single capacity inherent to any given area. There may be as many potential capacities as there are combinations of impact parameters and types of experiences to be offered'.

Murphy (1985) argues that the sociocultural problems of destinations in industrial nations are basically ones of irritation caused by the 'inconvenience tourism brings to local life, and the perceived changes to traditional beliefs and behaviour as the commercialism and consequences of mass tourism calls for more packaging of local cultures' (Murphy, 1985, p.151). On the other hand local involvement is considered the way of controlling the development, integrating tourism with other sectors and producing more original tourist products. Moreover the industry needs to capture the real issues of congestion, authenticity and acculturation. As Murphy (1985, p.151) summarises: 'By focusing on a destination community's heritage and culture in the development of its tourism product the industry will not only present a truer picture of a destination, it will become an ally of many public interest groups. Furthermore, by emphasising the individual character of a destination, tourism can become a vital force against the world-wide homogenisation of culture'

Jafari (1987) suggests tourism models taking into account its sociocultural aspects. He considers the tourist as the centre of a tourist model composed of six integrated components: corporation, emancipation, animation, repatriation, omission and incorporation. He advocates 'the model is intended not only to facilitate an understanding of the tourist himself, but also to lead to the development of an expanded model of tourism as a phenomenon' (Jafari, 1987, p.151). His purpose is built up within a framework of a systematic research with consequences for

planning, marketing and the formation of a body of knowledge in tourism. He argues that this earlier tourist model can be expanded or restructured for the design of a tourism model where 'the two worlds of ordinary (generating system) and non-ordinary (receiving system) appear as an integrated whole. They together form a megasystem or interconnected structure' (Jafari, 1987, p.158). Furthermore, he advocates the isolation of the 'tourist paradigm' from both the generating and receiving megasystems, representing the tourism system, to which the above two - tourist and tourism models-are part.

Milman and Pizam (1988), investigated Central Florida residents' perceptions of the social consequences and impacts of tourism. Their research stated that residents not only supported the present dimensions of tourism but also favoured its expansion. Despite this overall 'positive attitude', residents identified some positive and negative impacts, that tourism had on their community. These impacts were perceived to be traffic conditions, individual crimes, organised crimes, drug addiction and alcoholism. The major positive impacts were mostly economic: employment opportunities, income and standard of living, tax revenue and quality of life (Milman and Pizam,1988). Moreover, in relation to the question of which were the factors that influenced residents' attitudes to tourism, 'this study found that residents with the highest overall level of support for Central Florida tourism tended to be people who believe that the tourism industry was improving the image and the economy of their community; believed that the tourism industry was not causing illegal activities such as drugs, crimes and organised crime; viewed tourism jobs as relatively respectable; and were themselves employed in the tourism industry' (Milman and Pizam, 1988, p.203). Furthermore they consider their study as an addition to the body of knowledge on perceptions of residents towards the presence of tourism, contending that such studies emphasised the dilemma of the cost-benefit analysis in relation to tourism. Meanwhile, they advocate that tourism impacts are not universal. As they argue: 'rather, the intensity and direction of the impacts are a function of tourist activities, the cultural and economic distance between tourists and hosts, and the rapidity and intensity of tourism growth. Furthermore, it is obvious that residents' perception of these impacts are not necessarily objective, and is affected unequally by some factors more than others. For example, the perception that tourism induces crimes of

various sorts, creates almost automatically a negative attitude toward tourism regardless of whether these crimes are the results of tourism or not.' (Milman and Pizam, 1988, p.203). The same authors (1988) summarise in conclusion the need for more comparative analysis of results in other situations, a cross-national comparison, contributing in this way for building blocks construction and hypotheses towards the development of a theory on the social impacts of tourism.

Dogan (1989) considers that tourism has been a major source of intercultural contact, pointing out tourism as a trigger for the change of structures. He argues these changes have been both positive and negative and have varied across countries. Furthermore, he states the reactions of the residents towards these changes have been diverse 'ranging from active resistance to a complete adoption of Western culture' (Dogan, 1989, p.216). In addition, he notes the choice of strategies to deal with changes depends on sociocultural characteristics of the host community and the amount of change provoked by tourism. He contends 'that a previous homogenous community characterised by a particular response to tourism becomes diversified and groups exhibiting different responses to tourism emerge within the community as a result of touristic developments' (Dogan, 1989, p.216). Furthermore Dogan (1989) divided his research into four parts: 'First, major sociocultural consequences of international tourism are reviewed. Second, the primary forms of strategies developed by the people who are affected by these changes are considered. Third, the factors affecting the distribution of various strategies within a given community are discussed. Finally the factors associated with various strategies of adjustment are analysed in connection with a model' (Dogan, 1989, p217). This model, as stated before, assumes that the development of tourism, as agent of change, transforms a relatively homogeneous community into a heterogeneous one. The main issues emerging from Dogan (1989) research can be summarised in this way:

1. Sociocultural Consequences

- difficulty of separating the influence of tourism from changes originated by other factors;
- difficulty in knowing the actual impacts and how they can be measured;

- tourism may have both positive and negative consequences, depending from the number and type of tourists, the level of institutionalisation of tourism and socio-economic characteristics of the host population;
- the reactions of local residents towards the impacts of tourism vary;

2. Strategies For Adjustment Of Tourism

- if impacts of tourism are perceived as positive, by residents, their reaction will be acceptance of the change;
- if perceived as negative their reaction becomes more of a resistance;
- it is not a 'billiard ball model';
- among the strategies residents develop to deal with the effects of international tourism are: resistance, retreatism, boundary maintenance, revitalisation and adoption;
- every destination has a threshold level for tourism development;
- it is suggested a gradualist approach.

3. The Politics Of The Response To Tourism

- the variable homogeneity of a host population implies that several combinations of strategies may exist within a destination;
- the level of heterogeneity of the local population and the power structure may cause different responses to tourism and the forms of strategies developed;
- the power structure of a destination may regulate the responses of local residents and suppress certain reactions;
- the strategies of local population to the impacts of international tourism depend on their relationship to tourism and tourists. Local residents who benefit most from tourism or into closer contact to tourists likely choose a strategy of adoption;
- local residents negatively affected by tourism or with lesser contact with tourists are likely choose a strategy of resistance;
- those in-between may choose a strategy of boundary maintenance (passive acceptance) or retreatism (passive resistance), depending on whether the benefit-cost difference is positive or negative;

- interest differences among the political groups within the resident population are associated with their different response to tourism. ‘The traditional or agriculturally based groups whose interests are negatively affected by tourism will probably react to tourism either by active resistance or by passive retreatism, depending on the level of harm inflicted on them. On the other hand, the groups whose interests are associated with the newly developing tourism industry will probably react to tourism by wholly adopting it’ (Dogan,1989,p.227);
- tourism development depends very much on the policy of the government;
- ‘the gordian knot’ is how to avoid some negative impacts of tourism development without completely eliminating the development.

4. Development Of Responses To Tourism

- ‘Tourism usually begins to develop in a rural community which is relatively homogenous and transforms it to an urban and heterogeneous community’ (Dogan,1989, p.229);
- as a result of increasing heterogeneity all four responses (resistance, retreatism, boundary maintenance and adoption) may exist simultaneously within a destination;

Finally, Dogan (1989, p.232) concludes: ‘However, in general, it may be said that in a community previously dominated by a particular response to tourism, a diversity of responses will emerge as tourism develops, and groups with different interests and characteristics responses to tourism will be formed within the community’.

Brayley et. al., (1989) researched the ‘perceived influence of tourism on social issues’. The tool used was a self-administered questionnaire, including 25 items. The first 15 items used a five-point Likert scale to measure the level of agreement (or disagreement) with a statement about tourism’s relationship within a given social situation. The last 10 questions concerned the demographic characteristics of the respondents and their experience in international tourism. A convenience

sample was used consisting of 90 students in two undergraduate groups at the University of Hawaii. The questionnaires were distributed, completed and returned by a group of business students and a group of tourism students. The response rate was 100%. 'The ability to generalise the results of the study is limited because no attempt was made, through sampling, to allow for such generalisation to populations beyond those represented by these business or tourism student samples. Such a limitation is inherent with convenience samples' (Brayley et. al., 1989, p.286). The concept of social utility presented by the authors, is relevant in the way of dealing with tourism's influence on the establishment or change of social and cultural environments, labour conditions and community character (Brayley et. al., 1989). As far as findings and conclusions are concerned this research has demonstrated a positive view of tourists' influence on economic and social conditions in a host community, and the promotion of international understanding. It has also been found major perceptual differences between students with and without tourism backgrounds. The differences concern the degree of positive influences attributed to tourism to broad social issues. In effect, individuals with formal tourism education perceive greater influence of tourism on the improvement of economic, social, environmental, and political conditions. In so far (Brayley et. al., 1989, p.289) state: 'Whether the tourism student's choice of academic pursuit resulted from his perceptual orientation, or the expressed attitudes were the result of involvement in a tourism education program, cannot be readily determined from the available data. Nonetheless, a correlation must be acknowledged and an opportunity afforded to further exploration of this question'. Pearce (1989) notes that many studies of the social and cultural impact of tourism development were initially presented in terms of social and cultural costs, but subsequent research has tended considering also the advantages and disadvantages which the tourism development can bring to different destinations. Furthermore the same author (1989), also argues that a prime consideration in examining the social and cultural impact of tourism development is the nature and composition of the various groups involved and the relationships between these groups. Pearce (1989) also considers, the basic dichotomy of 'host and guests', promoted by Smith is accepted and Smith's typology is relevant for social/cultural impact studies (Table 3.3).

Type of Tourist	Numbers of Tourists	Adaptations to Local Norms
Explorer	Very limited	Accepts fully
Elite	Rarely seen	Adapts fully
Off-beat	Uncommon but seen	Adapts well
Unusual	Occasional	Adapts somewhat
Incipient mass	Steady flow	Seeks Western amenities
Mass	Continuous influx	Expects Western amenities
Charter	Massive arrivals	Demands Western amenities

Table 3.3 Frequency of Types of Tourists and their Adaptability to Local Norms

Source: Smith, V., 1977b, quoted in Pearce, 1989, p. 217

In addition, Pearce (1989) observes that demographic, social, ethnic and linguistic differences may exist within the host population, where 'certain sections of which may participate in or be affected by tourist development more than others' (Pearce, 1989, p.216). After specific characteristics of tourism, already cited, Pearce (1989) presents a summary of many of the social and cultural impacts which tourism development may have (Table 3.4).

(a)	Impact on population structure: Size of population; Age/sex composition; Modification of family size; Rural to urban transformation of population
(b)	Transformation of forms and types of occupation: Impact on/of language and qualification levels; Impact on occupational distribution by sector; Demand for female labour; Increase in seasonality of employment
(c)	Transformation of values: Political; Social; Religious; Moral
(d)	Influence on traditional way of life: On art, music and folklore; On habits and customs; On daily living
(e)	Modification of consumption patterns: Qualitative alterations; Quantitative alterations
(f)	Benefits to the tourist: Relaxation, recuperation, recreation; Change in environment; Widening of horizons; Social contact.

Table 3.4 The Social and Cultural Aspects of Tourism

Source: After Figuerole, 1976, Quoted in Pearce 1989, p. 218

After outlining the 'state of the art' of sociocultural impacts, Pearce (1989) presents a section of attitudinal and longitudinal studies which should be taken into account subsequently.

Inskeep (1991), notes that part of the research dealing with socio-economic impact is carried out by attitudinal surveys of residents, business surveys of tourism firms, and surveys of tourist characteristics, attitudes, and expenditure patterns, considering all of them, as important tools, for obtaining information on socio-economic impacts of tourism. Moreover he suggests: 'In any tourism area, continuous monitoring of socio-economic impacts is essential to determine how effectively policies and strategies are functioning and to detect and try to remedy any problems before they become serious' (Inskeep, 1991, p.365). He states that like environmental impacts, the type and extent of sociocultural and economic impacts depends mainly on the type and intensity of tourism development, and on the sociocultural and economic characteristics of the tourism destination, and how tourism is planned, developed and managed (1991). On the other hand, he favours an approach where the presentation of various types of impacts and the ways to respond them is undertaken. Inskeep (1991) advocates, in addition, that the planner in co-operation with politicians and community residents, must evaluate which of these or possibly others may have applications of the local situation. The prospects of Inskeep (1991) can be summarised as follows:

1. Hosts And Guest Relationships

- Complexity of resident-tourist relationships. As indicated by De Kadt (1979, p.50): 'the tourist-host encounters occur in three main contexts: where the tourist is purchasing some good or service from the host, where the tourist and host find themselves side by side, for example, on a sandy beach or at a night-club performance, and where the two parties come face to face with the object of exchanging information or ideas'. Inskeep quotes this citation stating also, that the first two are quantitatively the most common, although the third type of contact occurs when cross-cultural or international understanding is developed;
- Sociocultural impacts can occur from any type of contact between hosts and guests. Inskeep follows Mathieson and Wall (1982, p.135) where 'on the one hand, the tourist is mobile, relaxed, free spending, enjoying his leisure and absorbing the experience of being in a different place. In contrast the host is relatively stationary and, if employed in the tourist

industry, spends a large proportion of the time catering to the needs and desires of visitors.’

- Tourist-host relationships are also influenced by the characteristics of the interacting groups or individuals and also influenced by the conditions under which contact takes place. Inskip cites and follows Mathieson and Wall (1982) to whom most of the literature on tourist-host relationship is concerned with mass tourism and refers the UNESCO study (1976) where the relationship is characterised by four major features: its transitory nature; temporal and spatial constraints ; lack of spontaneity ; unequal and unbalanced experiences. (Quoted in Mathieson and Wall 1982, p.135; see also Inskip, 1991, p.367).

2. Types Of Socio-Economic Impacts

- There are both positive and negative economic and sociocultural impacts, varying from the type and intensity of tourism development and the characteristics of the host society;
- Whether impacts are considered positive or negative depends, on several variables such as income but depends as well on the perceptions of the host community which are heterogeneous;
- Positive impacts are: economic benefits, conservation of cultural heritage, renewal of cultural pride and cross-cultural exchange;
- If not planned and controlled tourism may generate negative impacts or reduce the positive ones. Negative impacts are: loss of potential economic benefits, economic and employment distortions, overcrowding and loss of amenities for residents, cultural impacts such as demonstration effect;
- Social problems: drugs, alcoholism, crime, prostitution.

3. Socio-Economic Policies and Impact Control Measures

- General socio-economic policies, such as community approach and carrying capacity;
- Socio-economic impact control measures such as regional distribution, incentives, training and education;

- Sociocultural programming such as cultural conservation (see Fig. 3.2).
- economic enhancement programming such as strengthening economic cross-sectoral linkages, ownership of tourist facilities and services, local employment, local management of tourist facilities and services, local tour and travel services, shopping, expansion of tourist activities;

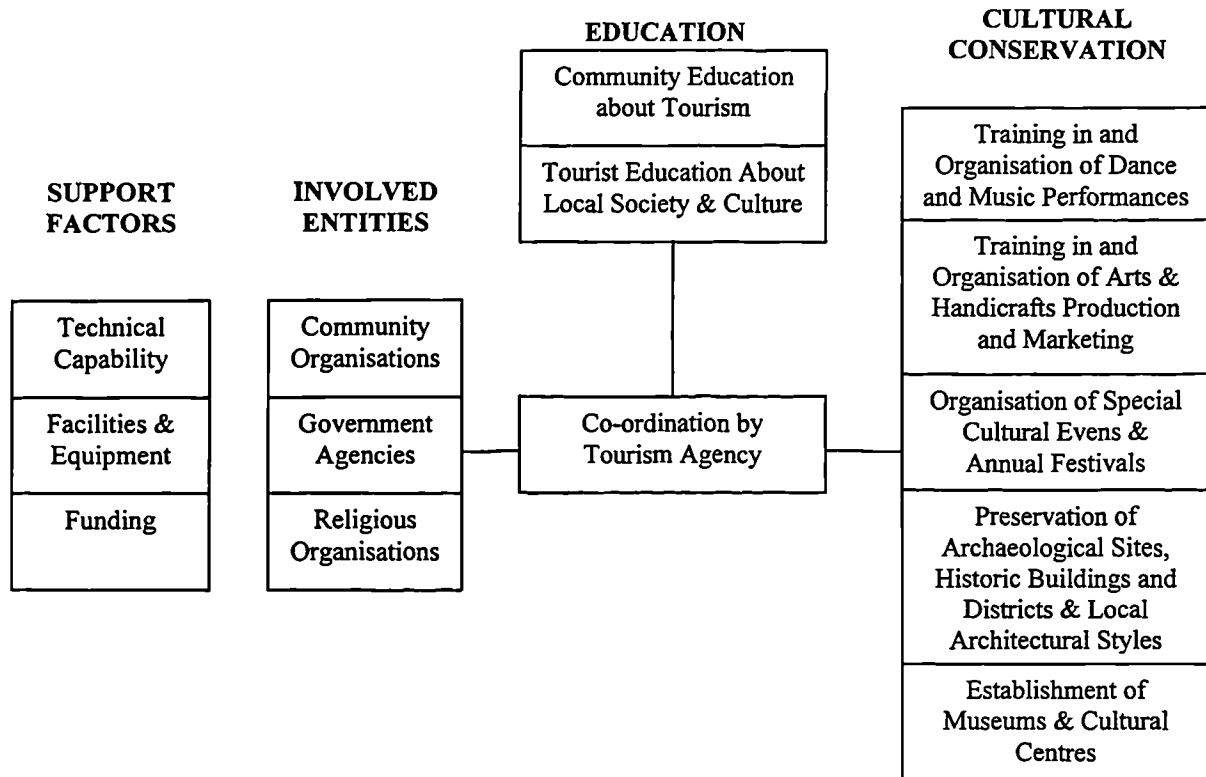


Figure 3.2 Model Sociocultural Program Organisational Structure

Source: Inskip, 1991, p. 379

To conclude with Inskip (1991, p.374): ‘As emphasised, each tourism area situation is unique, and an approach that is effective in one area is not necessarily appropriate in another, nor are all the techniques necessarily applicable in a particular area. In larger countries and regions, different approaches may be suitable in different places’.

Ryan (1991) pointing out the potential impacts of tourism suggests the importance of a number of variables. Following the same author (1991, pp.164-165), amongst these variables are:

- a) the number of tourists
- b) the types of tourist; the stage of tourism development
- d) the differential in economic development between tourist generating and tourist receiving destinations
- e) the difference in cultural norms between tourist generating and tourist receiving destinations
- f) the physical size of the area which affects the densities of tourist population
- g) the extent to which tourism is serviced by an immigrant worker population
- h) the degree to which incoming tourists purchase properties
- i) the degree to which locals retain ownership of properties and tourist facilities
- j) the attitudes of governmental bodies
- k) the beliefs of host communities, and the strength of those beliefs
- l) the role of intermediaries, and the degree to which those intermediaries identify with tourists or hosts
- m) the degree of exposure to other forces of technological, social and economic change
- n) the policies adopted with regard to tourist dispersal
- o) the marketing of the tourist destination and the images that are created of that destination
- p) the homogeneity of the host society
- q) the accessibility of the tourist destination
- r) the original strength of artistic and folkloric practices and the nature of those traditions’.

According to the same author (Ryan, 1991, p.165), what may be concluded is, ‘That whilst tourism can be a catalyst the nature of the change is not always predictable should host societies be aware of the potential that tourism has for such if, at an early stage, they seek to make decisions upon the volume and type of tourism they want. If, however, the host community leaves the of tourism to

outside bodies, in many cases the models of large resort complexes will emerge with the now all-too familiar refrain of societies reacting to changes that are imposed from without'. Furthermore, 'If it is said that the freedoms enjoyed by societies have the price of perpetual vigilance, this is also true in the case of tourism'(Ryan, 1991, p.164). More details are shown in Figure3.3.

Jenkins (1991) examines the ways in which tourism impacts on economies and societies. He presents a framework for the periodisation and categorisation of tourism. This author contends there is the first period, about the mid 1970s which saw a main focus on the economic impacts of tourism. In effect, studies by Bryden, Checci, Zinder and Archer, notes, were economic analyses of tourism (Jenkins, 1991). From about mid 1970 there was the proliferation of studies which were more critical of tourism's impact, especially concerning its effects on people and societies.

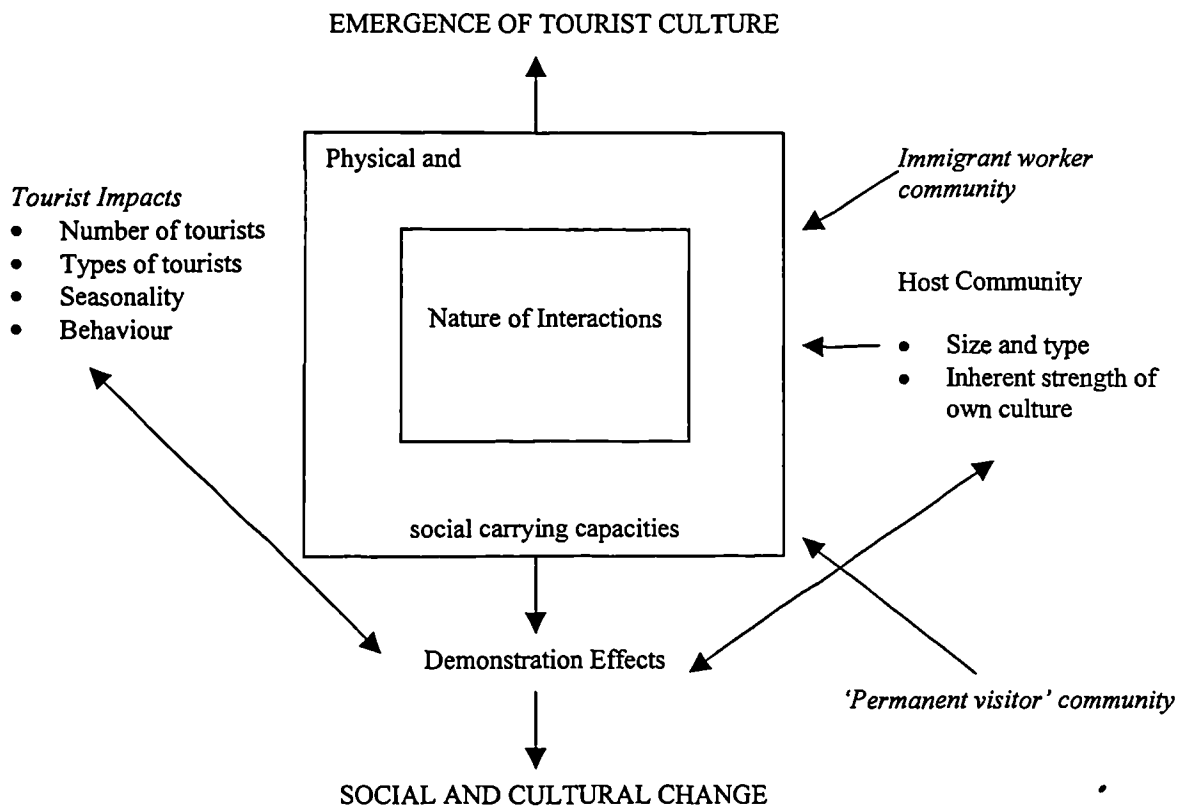


Figure 3.3 The Process of Social Change

Source: Ryan, 1991, p. 147

Studies by De Kadt, Smith Turner and Ash are examples as landmarks. Following the same author (Jenkins, 1991), from the early 1980s onward much more attention has been concentrated upon the question of environmental issues in tourism. In 1990 the consensus is that tourism has achieved maturity and recognition as an important economic activity both on a global point of view but also at regional and national levels. However Jenkins (1991) argues that this recognition is not uncritical. In effect, investors from public and private sectors, assume quite often that risk is inherent in the investment and that short-term economic gains might be submerged by long term social and environmental problems arising from investment in tourism. Furthermore Jenkins (1991) examines what the impacts of tourism might be related to the economy, society and environment, although in many cases impacts affect all the three areas. He considers, referring to social and cultural impacts of tourism 'in many cases, the regularity with which these phenomenon are reported, allows policymakers to anticipate certain impacts from future developments in tourism' (Jenkins, 1991, p.97), noting that many studies on social and cultural impacts have emphasised the negative aspects of tourism development. On the other hand the same author argues that many changes are difficult to measure and may not be entirely originated by tourism . In addition, considering tourism as a change-agent (Jenkins, 1991), outlines social demonstration effect, changing social values, decline in moral and religious values, crime, heritage, craftsman and folklore as sensitive areas and there is responsibility from the government as the only agent able to introduce required changes in the management of tourism. Moreover, to quote Jenkins (1991, p.100): 'on a social level, planned tourism can favour contacts between holidaymakers and the local population, will encourage cultural exchanges and ethnic relations, will lead to friendly and responsible enjoyment and finally, will strengthen links between countries'. The same author considers (1991), that the identification of sociocultural impacts is difficult because they can take a long time to emerge unlike the economic effects. He also argues (1991), how difficult it is to identify tourism as the cause of these changes as opposed to other influences, such as radio, newspapers and television. As a consequence he observes 'attempts should be made to take into the planning process the sociocultural dimension...and a careful assessment of the proposed development of the local community' (Jenkins, 1991, p.102) and the evolution of community tourism as expressed by Murphy is relevant

in recognising 'that to be 'sustainable' in the long term, tourism has to be acceptable to the community within which it takes place. More attention is now being given by planners to this aspect of development, and this is one approach to minimising the negative social effects of tourism and to increase its general acceptability within destinations'(Jenkins, 1991, p.102).

Cooper et. al., (1993) state that different approaches made the study of tourism's impact on the destination into a unified framework, but unfortunately much of impact analysis has been descriptive and with a lack of conditions for providing a framework for analysis. The same authors (1993) contend that to examine the impacts of tourism in a objective way, it is compulsory to move away from concepts such as 'water pollution', 'traffic conditions' and 'beach overcrowding' which all present value judgement with them. Following the same authors (1993), the impact of tourism on a destination will be influenced by a huge variety of factors such as:

- the volume of tourist arrivals;
- the structure of the host economy;
- the types of tourism activity;
- the difference in sociocultural characteristics between residents and tourists;
- the fragility of the local environment.

On the other hand they emphasise (1993) the social, cultural, environmental and economic impacts of tourism on a destination and their increase, but that there may be some threshold level of visitor presence beyond which the impacts cause disbenefits. Cooper et al. (1993), call such threshold limits 'saturation limits', rather than 'carrying capacity', 'since the latter carries with it some notion of sustainability' (1993, p.95). Moreover they advocate (1993), carrying capacity is defined as the level of tourist presence which provokes impacts on the host community, environment and economy, which is acceptable to both tourists and residents, and sustainability, on the other hand, is considered mainly for future time periods. Furthermore, they observe (1993), it is necessary to adjust the absolute number of tourists to take into account a number of factors such as:

- the length of stay;
- the characteristics of the tourists/hosts;
- the geographical concentration of tourists;
- the degree of seasonality.

In order to examine carrying capacity it is necessary to outline the areas of research. Figure 3.4 shows a schematic framework for the study of carrying capacity.

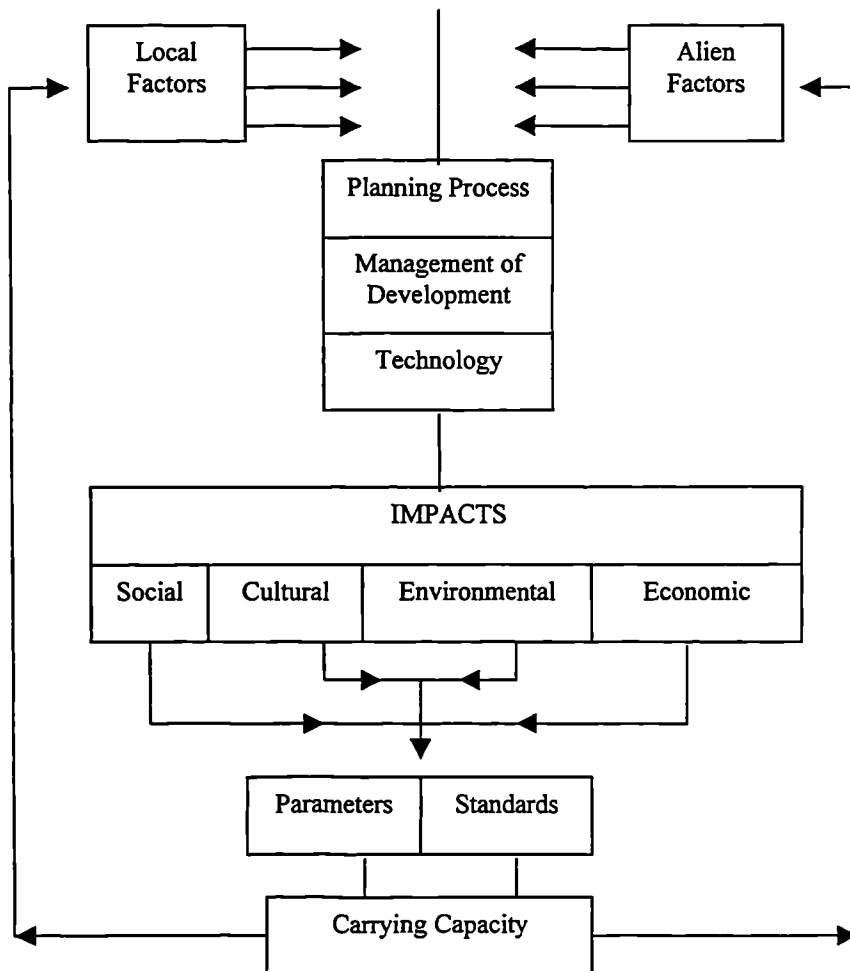


Figure 3.4 Carrying Capacity

Source: Cooper et. al., 1993, p. 95

As can be seen the determination of carrying capacity depends on a variety of factors 'which, following planning and regulation, generate an impact on the

destination. However, the carrying capacity feeds back both to hosts and to visitors (alien factors) and over time these influence the impact and, consequently, the carrying capacity. The concept of carrying capacity is a dynamic rather than a static concept' (Cooper et. al.,1993, p.96). Local and alien factors can be summarised as follows:

Local Factors

- social structure;
- culture;
- environment;
- economic structure;
- political structure;

Alien Factors

- tourist characteristics (social);
- type of tourist activity.

Moreover the same authors consider, planning is related with the organisation of factors in order to better manipulate future events and the management of tourism implies putting plans into practice (1993). In addition they point out: 'the planning and management process should aim to secure the maximum positive benefits (as dictated by the planning objectives) while incurring the minimum costs' (Cooper et. al., 1993, p.97). Also they stress the local and alien factors, directed by planning and management of tourism will imply impacts on all structure of the destination and its residents (1993).

Following the same authors (1993) the impact caused by the interaction of hosts and tourists is a well-documented case, and the findings of Smith (1989) in her book ' Host and Guests' with an anthropological focus gained consensus in the academic community. As noted early: 'any form of economic development will carry with it implications for the social structure and cultural aspects of the population. Even domestic tourism, where hosts and tourists are generally from the

same sociocultural background, results in social and cultural change as a result of this host/tourist contact' (Cooper et. al., 1993, p.98).

According the same authors (1993), (also personal notes taken from the lectures of Tourism Development, 1990-1991, presented by Fletcher at Surrey University), a process of tourism development, considering the tourism product as it grows from infancy to maturity, looks something like this:

- a few tourists (pioneer) 'discover' a place or destination;
- in response, local entrepreneurs provide new facilities or special facilities to accommodate the growing number of visitors and, more importantly, to attract more;
- the public sector provides new or improved infrastructures to cater for the visitors;
- finally, institutionalised or mass tourism is developed, which is mainly resort based and presented as a package. It is based upon large volume production (bulk), in order to exploit economies of scale in marketing, accommodation and transport.

Cooper et. al., (1993) commented there is no single coherent body of knowledge or theory which explains tourism development. To quote Cooper et. al., (1993, p.98): 'Evidence, such as it is, is rather piecemeal and comes from a number of case studies. Furthermore, the situation is compounded by the fact that different disciplines approach the subject matter in different ways, and although many aspects of the studies overlap, it is difficult to tie the different conclusions together into a single body of thought.' Furthermore they observe (1993) the different approaches may be categorised and summarised as follows:

- psychological;
- sociological;
- socio-economic.

In addition they argue tourists do not have to come into direct contact with residents for there to be a social impact (1993). New employment opportunities will cause social change. Furthermore, new forms of communications, transport and infrastructures, due to tourism development, will also add to the process, being the indirect sociocultural effects. On the other hand, increases in income levels and the spread of the monetized sector will modify the consumer behaviour. Such changes (television, radio, etc.) will expose the residents to a greater type of wants and needs and 'speed up' the way of social change. These effects may be seen as induced sociocultural effects (Cooper et. al., 1993). The magnitude of the direct sociocultural impact will also be influenced by the extent of the difference in sociocultural characteristics between residents and tourists. Inskip (1991) suggests that these differences between residents and tourists include:

- Basic value and logic systems:
- religious beliefs;
- traditions;
- customs;
- life-styles;
- behavioural patterns;
- dress codes;
- sense of time budgeting;
- attitude to strangers;
- differences in languages.

As stated earlier the sociocultural impact can be either positive or negative. Lastly, it is relevant to note that tourism, as other development options, creates new income opportunities which are 'unlikely be evenly distributed, and the creation of new jobs with higher than average wage levels may create social pressures between the hosts who occupy those posts and their families and peers. A major problem can also occur because of a real (and sometimes apparent) difference in wealth between the tourists and their hosts' (Cooper et. al., 1993, p.102). Tourists, as holidaymakers, show off spending power and behaviour that is not their routine

during the usual everyday life. The residents, on the other hand, may not appreciate, as workers, this discrepancy.

Mckercher (1993) contends tourism enjoys a love-hate relationship with its host community. He states (1993), as the one hand, it has been identified as an economic saviour, generating income and tax revenue, and as a catalyst for regional development. On the other hand, it as been seen 'as a pariah' that destroys host societies and cultures with bad effects on the environment. He advocates, both arguments have some validity: 'Tourism carries with it the potential to inflict both beneficial and detrimental impacts on host communities and host environments' (Mckercher, 1993, p.6). Furthermore, he observes (1993), despite the body of literature about impacts being extensive, few, if any authors have looked for the 'underlying reasons' why tourism development seems to bring negative impacts. Mckercher (1993) suggests for rectifying this situation identifying eight underlying structures or fundamental truths associated with all types of tourism development. See Table 3.5.

1.	As an industrial activity, tourism consumes resources, creates waste and has specific infrastructure needs.
2.	As a consumer of resources, it has the ability to over consume resources.
3.	Tourism, as a resource dependent industry must compete for scarce resources to ensure its survival.
4.	Tourism is a private sector dominated industry, with investment decisions being based predominantly on profit maximisation.
5.	Tourism is a multi-faceted industry and as such, it is almost impossible to control.
6.	
7.	Tourists are consumers, not anthropologists.
8.	Tourism is entertainment.
	Unlike other industrial activities, tourism generates income by importing clients rather than exporting its product

Table 3.5 Some Fundamental Truths about Tourism

Source: McKercher, 1993, p. 7

Moreover, he argues the process of tourism development, contains the catalyst for much of the potential impacts and the truths are 'both the inherent and unavoidable consequence of embarking on the path of tourism development' (Mckercher, 1993, p.6). Following this author these 'fundamental truths' can be useful for:

- developing future tourism policies;
- offering insights about the causes and nature of much impacts;
- accepting them, as a consequence, planners, policy makers and private sector leaders can start developing policies and programmes to minimise impacts ;
- understanding these 'fundamental truths' can play a critical role in reducing
- community feelings against tourism;

However Mckercher (1993) recognises the influence of these 'truths' on residents will not be uniform.

Crandall (1994) points out tourism affects the society and culture of a destination as well as its economy and environment. He states this is mainly true of developing countries that depend on tourism as an economic development option. In so far he presents, an overview of the various types of social impacts that could be found in a tourist destination and describes a number of methodologies that can be used to examine them. Furthermore he contends the assessment of social impacts is difficult because one cannot quantify social impacts, subtract costs from benefits and get a conclusion as in an economic cost/benefit analysis. The first part of the study at hand presents a broad overview of the various negative and positive social impacts and is divided into socio-economic and sociocultural. To quote Crandall (1994, p.414): 'The main focus is on small developing countries where, for many reasons negative impacts are more prevalent than in large developed regions with a mature and stable economy. The second part presents a discussion of some of the various methodologies that can be used to assess the social impact of tourism on a receiving area'. The main division of Crandall's categorisation can be summarised as follows:

1. Socio-Economic Impacts

- economic independence;
- labour force displacement;
- changes in forms of employment;
- changes in land values ownership;
- improved standard of living;
- changes in the political-economic system.

To quote Crandall (1994,p.414): ‘While the tourism industry has definite effects on the economy of a country in terms of job creation, increased foreign exchange earnings, or a growth in the import bill, there are also indirect socio-economic impacts, many that have both positive and negative aspects to them’. See Table 3.6.

Impact	Positive Aspects	Negative Aspects
<i>Socioeconomic</i>		
Individual economic independence	Wages, upward mobility	Conflict in traditional societies
Labour force displacement	Migration to tourism region for employment	Forced migration of residents from region
Changes in employment	Employment in tourism sector; acquisitions of new skills	Seasonal unemployment; abandonment of traditional forms of employment
Changes in land value	Increased value of land	Higher land prices; conflict over land use; competition for natural resources
Improved living standards	Improved services, facilities and infrastructure	Inflation generated by tourism
Changes in political-economic system	Growth of new elite; growth of depressed regions	Splits in national unity
<i>Sociocultural</i>		
Growth in undesired activities	_____	Growth in crime, drugs, gambling and prostitution

Table contd

Social dualism	Cross-cultural exchange; widened dimensions	Conflicts in values and life styles
Demonstration effect	Stimulation to improve living standards	Frustration; increased spending; growth in import bill
Culture as a commercial commodity	Preservation of cultural heritage; revival of traditional art forms; growth of pride	Culture loses meaning as it is commercialised for tourists; stereotypes and artificial products develop
Growth of resentment and hostility	_____	Growth of servile attitude, violence and conflict

Table 3.6 Potential Social Impacts of Tourism

Source: Crandall, 1994, p. 415

2. Sociocultural Impacts

- grow of undesirable activities;
- social dualism;
- demonstration effect;
- culture as a commercial commodity;
- growth of hostility to tourists.

Butler (1975) identified factors as the major ones involved in the process of social change, provoked by tourism, as well as ones that can influence the tourism saturation point of a destination. To follow Butler (1975, pp.85-86):

‘1. Visitor Characteristics

- a) Number of visitors;
- b) Length of stay of visitors;
- c) Racial characteristics of visitors;
- d) Economic characteristics of tourists;
- e) Activities of tourists;

2. Characteristics Of The Destination Area And Its Residents

- a) Economic development of the area;

- b) Degree of local involvement in tourism;
- c) Spatial characteristics of development;
- d) Strength of local culture;
- e) Other characteristics (ex: distance, degree of isolation, political attitude, degree of nationalism)'.

The second part of the study of Crandall (1994), presents various social science methodologies which can be used 'to look at the impacts of tourism. They are divided into surveys-attitude survey, public surveys, key informants, Delphi studies, and participant observation-and analysis of secondary sources-content analysis and statistical analysis' (Crandall, 1994, p.421). See also Table 3.7.

Impact	Surveys/Interviews				Secondary Choices	
	Surveys	Key Informants	Delphi	Participant Observation	Data Analysis	Content Analysis
<i>Socioeconomic</i>						
Economic independence	X	X			X	
Labour force displacement		X			X	
Employment Changes	X	X	X		X	
Changes in land value		X	X		X	
Improved living standards	X	X			X	
Changes in political-economic system		X	X		X	
<i>Sociocultural</i>						
Undesirable activities	X	X		X	X	X
Social Dualism	X	X	X	X		X
Demonstration effect	X	X		X		
Commercialisation of culture	X	X	X	X		
Hostility	X	X	X	X		X

Table 3.7 Primary Data Collection Methods for Potential Impacts

Source: Crandall, 1994, p. 418

Brown and Giles (1994) suggest that a need to understand the nature of tourism impacts is well known and a pragmatic approach toward development has been

synchronised with a desire to maximise economic benefits while minimising any negative social consequences. Furthermore they note (Brown and Giles, 1994) that research to identify community attitudes towards development applications is becoming usual in the planning process. However they argue (1994, p.765) 'very little interest has been demonstrated in post-development studies which seek to examine the way communities adapt to the social effects of tourism'.

Krippendorf (1987), contends the social effects of tourism are so relevant that they should have been studied before everything else. It has also been emphasised 'investigations of the consequences of tourism in tourist areas ought to begin from an analysis of the individual and collective adaptation made by a host people in regard to these service functions. Such adaptations may be considered the primary consequences of tourism' (Nash, 1989, p.48). On the other hand Brown and Giles (1994, p.765) argue despite these judgements, 'the academic literature includes very few studies which have focused on host adaptations to tourism'. In so far the same authors (Brown and Giles, 1994, p.765) discuss 'the type of modifications to their daily lifestyle made by members of a host community in response to the social impact of tourism'. Craik (quoted in Brown and Giles, 1994, p.765), has suggested that 'in contrast to the dissipation of economic impacts and imbalances across a whole economy or region, social and cultural impacts have immediate consequences on the everyday lives of residents'. These consequences will be most relevant during the peak season. As Doggy (1989, p.22) has noted: 'Furthermore, local inhabitants who appear to change their behaviour in the presence of the tourists are observed to return to their customary lifestyle after the tourists have left'.

The research of Brown and Giles (1994) contains the results of an exploratory study based on the assumption that residents develop ways of dealing during peak periods of tourism. Following the same authors (1994) coping strategies would imply temporary changes in resident 'behaviour when they do activities differently' to how they would be done in normal non-peak periods. To quote Brown and Giles (1994, p.765): 'They could be categorized, using MacCannell's (1986) definitions, as being 'defensive' or 'direct'. Defensive coping involves 'protecting self by getting away from threatening inputs and either mental or physical escape from the

traumatic situation. One either flees from the problem and in future avoids going near the stress inducing situation, or blocks out the threatening inputs and denies the inputs are stressful' Direct coping involves taking stock of a situation, identifying an ultimate goal or adjustment, and coming up with a new approach' (Brown and Giles, 1994, quoting MacCannell). On the other hand after reviewing important literature, Brown and Giles (1994), discuss the study and developed models for dealing with strategies. They also put implications for further research. The exploratory study was conducted in Byron Bay and took the form of a focus group. Further details will be presented in the chapter dealing with attitudes.

Mercer's (1994) study upon native people on Australia, contends that many of the ideas are also useful to other national destinations 'where tourism has recently brought together peoples from different cultural and economic backgrounds' (Mercer, 1994, p.124). Two case studies are presented (1994), both coping with control and choice of land tenure. He contends (1994) that transnational tourism corporations have implications for geography of tourism and also for new 'pleasure periphery'. Moreover he indicates (1994) a holistic point of view in considering tourism impacts. To quote Mercer (1994, pp. 127-128): 'Three kinds of tourism 'impacts' have been alluded to so far: economic, social (or cultural) and environmental. Much of the literature on tourism distinguishes these impacts for analytical purposes. But one of the main arguments here is that such separation is misplaced. 'Economic' impacts for example, invariably have important distributional effects which are ultimately 'social' in their consequences. Further, the 'environmental' destruction of say, an Australian Aboriginal sacred site can have significant cultural ramifications. It also has to be continually recognised that 'tourism' is frequently merely one part of the total development process'. In effect, in the Australian case studies, road construction and energy and water supply for mineral exploration or pastoral development provide the infrastructure for the development of tourism. At the end quoting Krippendorf, Mercer (1994) refers to as a 'fundamental political transformation in the conception of tourism' (quoted in Mercer, 1994, p.143) to better dealing with the needs and aspirations of the aboriginal population. As Theobald (1994, p.143) put 'The key problem facing native peoples including Aboriginals today is how they can achieve the most

benefits derived from tourism without being overrun and overwhelmed by the excesses that tourism itself can cause’.

Ritcher (1994) states the political role of gender, as it relates to tourism. Further she contends that the private tourism sector is men dominate and that is almost true for the public sector as well. To quote Ritcher (1994, p.156): ‘Once we acknowledge that tourism has been marginalized and trivialized as a research subject and requires careful analysis, it is a logical next step to explore its impact in the context of such a basic variable as gender’.

Holde (1994) notes the interpretation of tourism as a commodity and its consequences for lesser-developed countries interested in the development of tourism in a sustainable way in the future. He argues (1994) that an industry has developed offering products for consumption that includes hosts communities as part of the tourist system. Moreover the same author (1994) advocates that to develop tourism in a sustainable form to be enjoyed by future generations implies an acceptable balance to host communities between economic, social and environmental impacts. This, he argues (1994), will involve consultation and participation of residents in formulating and operating of any developmental policy.

Reisinger (1994) summarises research of existing literature about the concept of social contact and shows its importance to the cross-cultural tourist/host contact, The latter refers to the personal association or interaction between tourists and hosts. Tourists are temporary visitors staying at least 24 hours in the country visited for the purpose of leisure, recreation and holiday. Hosts, are people of the visited country who are directly and indirectly employed in the tourism sector and provide service to tourists. Resinger (1994, p.751) concludes: ‘Cultural differences, together with asymmetry of the frequent and transitory tourist-host contact, are the most important factors which influence interaction difficulties between tourists and hosts...Therefore, understanding of cross-cultural tourist-host contact and the influence of the cultural background of tourists and hosts is the key feature for identification of the future potential for tourist-host interaction and the effects of this interaction on the overall tourist holiday satisfaction’. In addition the author

(1994) presents recommendations for the development of positive cross-cultural tourist-host contact, with the consequent inclusion of educational and training programmes also for residents.

Teo (1994) assesses the sociocultural impact of tourism in Singapore. He contends (1994) tourism has grown quickly and has been economically beneficial, but its social and cultural impacts have been both positive and negative. The latter includes the demonstration effect, resentment of foreign workers, changes to landscape excluding locals, the commercialisation of religious practices and the development of touts at shopping centres. In addition Teo (1994) uses Doxey's irridex and Butler's model of tourism development to examine 'how far these effects are tilting perceptions of tourism from an acceptable to an unacceptable activity and suggests ways in which negative impacts can be reduced' (Teo, 1994, p.126). Inspired in Mathieson and Wall (1982), Teo, defines social and cultural impacts as the ways in which tourism is contributing to changes in the value systems, morals and their conduct, individual behaviour, family relationships, collective life styles, creative expressions, traditional ceremonies and community organisations. He states (1994) the effects provoked on the hosts as a consequence of direct or indirect association with tourists. Furthermore Teo (1994, pp.126-127) distinguishes social impacts from cultural ones: 'Social impacts usually involve more immediate changes in the quality of life and adjustments to the tourism industry in the destination communities. In contrast cultural impacts appear as long-term changes in the society's norms and standards, altering the community's social relationships as well as material forms and artefacts'. After describing factors affecting the tourist-host relationship, taking into account De Kadt and Smith, Teo (1994) advocates the necessity to consider the rapidity of tourism development. To quote Teo (1994, p.130): 'If the tourism phenomenon develops quickly and without inhibition, the impact will be stronger as it does not allow time for the people to react or the authorities to plan'. After analysing sociocultural impacting Singapore and issues arising from sociocultural impacts Teo (1994) contends that the Doxey irridex, does not appear being very high, and it need not rise if adequate measures are taken to consider that tourism is but one of the growing sectors. In effect a study involving 320 respondents was conducted in 1991, to measure the Doxey index in Singapore. 'In this analysis it was found that

Singapore's have gone beyond euphoria and have reached the state of apathy' (Teo, 1994, p.134). Furthermore Teo (1994) concludes tourism does not always bring benefits to residents, but what is important is that any effect should be monitored and appraised. Teo (1994), as a consequence, suggests a broad strategy to manage the impacts which can be summarised as follows:

- examine the context of the society in terms of demographic composition, ethnic distribution, religious and class structure and language. This will help the resilience of residents to cultural drift or assimilation;
- examine the pace of tourism development. Where is it happening, how fast, who is it likely to affect and what impacts have already happened;
- evaluate how bad effects can be controlled and project what will occur if tourism augments faster and faster;
- decide whether the development should be controlled, from the above information.

Lastly, Teo (1994, p.135), concludes: 'In Singapore, planning for the impacts of tourism has been approached in two ways. First, a mitigation of the existing impacts by establishing spatial and temporal controls, e.g., not encouraging tourists into the housing estates of Singapore, is one solution. Second, market manipulation, is also undertaken as a subtle way of filtering the types of tourists the country desires. Upper income tourists are encouraged from rich and poor countries alike, as are business and convention tourists'.

Prentice et. al., (1994) state contemporary research in tourism is increasingly focusing on the experiences and benefits gained from being tourists. Moreover they argue (1994) these experiences and benefits often derive from activities pursued and may endear the tourist to a destination area. This latter idea is explored using a survey dealing to South Wales (Gower). They stress that for the majority of leisure tourists endearment is effected through activities and generalist interaction with local people. However, they note (Prentice et. al., 1994, p.117): 'Segmentation on the bases of whether or not tourists have local contacts in the destination area and whether or not they are repeat visitors is sufficiently important to call into question

the validity of generalizing across all leisure tourists. For the segment with local contacts, endearment may be to friends and relatives rather than to the destination area it self'. In Gower, as a destination where leisure tourists and host populations are not spatially distinct, interaction between hosts and guests can be expected on one hand. On the other hand due to the two groups having the same language the endearment can be assumed in Gower. Prentice et. al., (1994, p.122) conclude: 'It is not statistics on tourist visits that are of interest, but which tourists are making the visits and the meaning of these visits to the different groups of tourists and to their hosts. In such a research effort it is important to distinguish between endearment to places and endearment to friends or relatives resident in these places'.

Pearce (1994) observes that the topic tourist-resident impacts is subsumed within the topic area of the social impacts of tourism, despite some tourist-resident contacts having economic and environmental components, putting tourist-resident research at the core of the interconnected themes Pearce (1994) also distinguishes tourist-resident impacts deriving directly from tourists dealing with residents versus tourism the phenomenon influencing residents attitudes and feelings. Its research concentrates mainly on tourist-resident interaction with an emphasis on the residents, although some remarks are presented on the effects of the contact on the tourists themselves. On the other hand, Pearce (1994) states that social impacts effects may be real, when objective data can be collected (e.g., length of time spent in doing one's shopping) or perceived (e.g., the view that there is more crime in the community and life is less safe than in the past). From the point of view of assessing community feeling both impacts real and perceived are equally important. To quote Pearce (1994, pp.103-104): 'If residents believe an impact exists, then their behaviour will be altered irrespective of the accuracy of the perception. Nevertheless it is valuable to comment on whether impacts are objectively verifiable or subjectively felt, since the tactics for preventing and dealing with social impacts may be different in the two cases. For example, perceived impacts may be changed by the processes of education and community information whereas this is less of an option for objectively verifiable impacts (such as restricted access to a recreation site)'. Pearce (1994) notes that tourism-resident impacts are important from both an ethical point of view and from the

international evidence indicating that when negative impacts are not taken into account there can be great economical and political consequences. According to Pearce (1994), this community reversion may include:

- a loss of support for the authorities/councils in charge for the promotion of tourism;
- resistance as far as work in tourism is concerned;
- a lack of enthusiasm in promoting tourism by word of mouth;
- a hostility to the tourists themselves;
- delays in the construction of tourism development motivated by community protests.

Pearce (1994) also considers that tourist-resident interaction is an example of cross-cultural interaction and the effects of tourist-resident contact are mediated by tourist's affluence, motivation, transience and status in the host community. Moreover there are many types of tourists with particular motivations and profiles. Furthermore Pearce (1994, p.106), advises: 'Some of these visitors are intensely interested in interacting with residents while for others the local people are little more than a part of the scenery. Additionally the size and technological sophistication of the host community plays a crucial role mediating the impact of tourism and the nature of the resident-host contact...the specific contexts and communities studied must always limit the generalizations which can be made'. After presenting the effects of contact in diverse cases and circumstances: direct contact influences for isolated and poor communities, indirect contact effects for isolated and poor communities, direct contact effects for technologically advanced communities (1994), summarises the tourist impact on the local people. Following the same author (1994) tourists appear to have maximum social and psychological impact on their hosts when destinations are small, unsophisticated and isolated. This impact may be a great one, either in direct encounters or indirect ones. When the destination is technologically more advanced and the affluence gap between tourists and hosts narrower, the contact experience has less impact. In such a situation, tourists may develop friendships with the hosts, and visitors can support local social organisations as well as promoting pride in the destination. The

negative effects provoke interpersonal friction, but also indirect stress to the hosts through environmental degradation and infrastructure costs. Despite this picture, tourism can still be compared favourably to many other industries. There are cases where residents recognise the impacts of tourism but still support its development compared to other development options. Moreover, many studies fail to decipher the effects of tourism on residents from the effect of growth in general.

Pearce (1994) considers, in addition, that trying to understand and order the studies reviewed above, stage or step models have been popular namely (Smith 1978; Doxey 1975; Butler 1980). In this latter author, Butler (1980), the impacts of tourism are not the main focus of attention. Instead, he is more concerned with the evolution of destination areas, despite the attitudes of residents and community support for tourism development are discussed as a part of the general research. Butler (1980) advocates tourism destinations as evolving through the stages of exploration, involvement, development, consolidation, stagnation and then either decline or rejuvenation. In the consolidation stage Butler (1980, p.8) points out: 'The large numbers of visitors and the facilities provided for them can be expected to arouse some opposition and discontent among permanent residents, particularly those not involved in the tourist industry in any way, and to result in some deprivation and restrictions upon their activities'. The stagnation stage where the peak numbers of visitors will have been reached is seen by Butler (1980, p.8) as follows: 'Capacity levels for many variables will have been reached or exceeded with attendant environmental, social, and economic problems. The area will have a well-established image but it will no longer be in fashion'.

Pearce (1994) addresses several criticisms in relation to 'Stage -Based Model' or step models-Smith, Doxey and Butler-arguing that the main question is 'whether or not the models advanced in the tourism literature to date are really post-hoc descriptive devices or whether they have predictive possibilities' (Pearce, 1994, p.115). A more detailed critical approach will be presented in this dissertation. Now it suffices to say, Pearce, summarises the state of the art of social impacts in a way of paramount importance. He notes the work on social impacts of tourism has continued throughout the past decade and the models reviewed above (Smith, Doxey and Butler) despite being cited, have been overcome. Pearce (1994) states,

that studies conducted in the 1980s may be called under a new flag-a segmentation approach of tourism's social impacts. To quote Pearce (1994, pp.115-116): 'This work has the following characteristics. It describes in detail resident reactions to the impact of tourism. In this work, lists of critical social impacts have been constructed, factor analysed, employed in different countries and related to the demographic characteristics of respondents. Typical examples of this approach include the work of Brougham and Butler, 1981; Liu and Var 1986; Liu, Sheldon and Var 1987; Long, Perdue and Allen 1990; Milman and Pizam 1988; Murphy 1981, 1985; Sheldon and Var 1984. Across these studies there is recurring evidence that older residents are more affected by tourism impacts than younger residents, those working in the tourist industry have more positive attitudes and those living closer to the tourist zone have more negative attitudes towards tourism, as do those individuals with higher daily contact with tourists.' Moreover, Pearce (1994), notes that this line of work suggests useful ways for an understanding of tourist-resident interaction. It seems to indicate, according to Pearce (1994), that attitudes towards tourism and tourists have an equity function. For example those working in tourism have more positive attitudes towards the industry. The costs to benefit ratios vary with different groups. To quote Pearce (1994, p.116): 'while equity considerations appear to underlie much of the work done in the past decade in the segmentation category of tourism's social impacts, there remains a need to model or portray the general attitudes towards tourism held by residents. It is apparent from the studies of Brougham and Butler and others that there is an organisation of people's attitudes to tourism which results in consistent findings in segmentation analysis. One can express this same point in a different language system, one familiar particularly to European psychologists-there appear to exist social representations of the tourism industry within communities' (Pearce refers Farr 1987; and Moscovici 1984).

The pioneer study of Brougham and Butler (1981) 'A Segmentation Analysis of Resident Attitudes to the Social Impact of Tourism' argues there is increasing evidence that costs and benefits from tourism do not accrue equally to residents of a destination and the applicability of a segmentation procedure is discussed and examples are presented of explanatory models of resident attitudes towards tourism's social impact. In this study which will be presented, with more detail in

the chapter dealing with attitudes as well as theory of social representation relevant differences in resident attitudes are identified and associated to personal and locational characteristics, with tourist contact, length of residence, age and language as the major explanatory variables.

Lastly, Pearce (1994) shows emerging solutions, 'five tactics' for arresting the decline of tourist-resident attitudes which can be summarised as follows:

- education and tourism;
- incorporating community perspectives;
- principle of increasing resident opportunity;
- community equity and management committees;
- research and monitoring.

Archer and Cooper (1994) highlight the benefits and costs of tourism impact to both, visitors and residents. On the other hand the latter benefit not only financially but have at the same time various types of costs. The same authors (1994) emphasise the positive and negative effects of tourism, from the point of view of the host country or destination. They contend (1994), that the discussion dealing with positive and negative impacts of tourism must include notions of carrying capacity and how impacts can be assessed. Also they note that the difficulty of quantifying the environmental and social impacts of tourism has delayed the development of impact methodologies, but concepts such as sustainable tourism development and the responsible consumption of tourism are a good answer along the concepts of planning and management of tourism. Furthermore, they comment (1994), despite the economic costs and benefits, tourism also imposes political, cultural, social, moral and environmental change upon residents and such costs must be taken into account from decision-makers. Meanwhile, to quote Archer and Cooper (1994, p.78): 'Tourism, however is not alone in generating such "costs" and it is likely that other forms of development may create far more adverse side-effects which more than offset any advantages they may possess over tourism in purely economic terms. Analysing such effects is properly the province of experts in each field'. As far as sociocultural effects are concerned they suggest (1994), a

clear need for examining the social carrying capacity of destinations, closely linked to community-based models of tourism planning, and, on the other hand they apply for the quantification of socioeconomic costs and benefits of tourism which requires the joint efforts of sociologists and economists.

Following the same authors (1994), they observe if adverse effects are to be prevented or remedied that politicians and planners should be less concerned with number of visitors and have more consideration to the long-term welfare of the resident population. They advocate key questions must be considered such as:

- ‘1. How many and what type of tourists does the resident population of an area wish to attract?
2. What is the optimum number of tourists that the area can support in terms of its physical, environmental and social carrying capacity?
3. How can these tourists contribute to the enhancement of the life styles of the residents?’ (1994, p.89).

As a consequence Archer and Cooper (1994) contend that planning and definition of responsibilities of public and private sectors are essential, in order to maximise the economic and social benefits of tourism to the resident population, while, at the same time, mitigating or preferentially eliminating the adverse impacts. In so far Archer and Cooper (1994, p.89) conclude: ‘Tourism creates both positive and negative effects in the destination country or region. Thoughtful policy-making and planning can do much to minimize or even remove the negative effects. Tourism can be a very positive means of increasing the economic, social, cultural and environmental life of a country. The major issue now is can politicians, planners and developers rise to the challenge and create a truly responsible tourism industry-one which brings long-term benefits to residents and tourism alike without damaging the physical and cultural environment of the destination region?’

Snaith and Haley (1994) examined residents’ perception of tourism development within the theoretical framework of social capacity presenting as a case study, the city of York. They summarised (1994, p.831) four main findings:

- ‘1. Residents’ characteristics were able to predict a significant amount of the explained variance in residents’ positive perceptions of tourism development;
2. Residents’ characteristics also contributed significantly to residents’ support for a local tax levy for tourism development;
3. Residents’ economic reliance on the tourism industry made a significant contribution to the variance in residents’ positive perceptions of tourism development;
4. Residents’ positive perceptions of tourism development was an important predictor of residents’ support for local tax levy for tourism development’.

From these findings, Snaith and Haley (1994, p.832) point out: ‘The implication that emerges from these findings is that researchers and planners alike should not ignore the potential of residents’ characteristics to predict a communities’ positive perceptions of tourism development and their support for specific tourism policies in large, relatively stable urban populations’, which constitutes a challenge for leaders, politicians and community in general as far as part of a tourism policy is concerned.

Rozenberg (1995) in her research upon the island of Ibiza in the Balearic group (Spain) explores several general questions for examining the analytical model of tourism, and its cultural implications. The main questions, for Rozenberg (1995, p.159) are:

- ‘how do visitors and the indigenous population represent the culture of the other?
- What kinds of material and symbolic exchanges take place between them?
- What part does culture play in the development of the tourist product and its commercialization?
- How are both individual and collective identities tested by the diffusion of international tourism?’ The author (1995) outlines that the tourism development caused three types of mobility:

- intersectoral mobility in which agriculture is abandoned in favour of construction, hotel-keeping and the service sector in general;
- spatial mobility with the exodus from the countryside to urban spaces including also the immigration from the mainland (Spain);
- social stratification with the accentuation of inequalities in a much egalitarian society.

In this process of global mobility the islanders have been favoured with the consequent raise in social terms (Rozenberg, 1995). The competition between the value of land for agriculture and its value for tourism provoked the adoption of equal inheritance 'stripped the eldest brother of his privileges' (Rozenberg, 1995, p.161). Solidarities and alliances were 'woven together' causing a pluralistic society. On the other hand, despite relationships between islanders and foreigners settling in the island for a long time, with foreigners living as archaeologists, architects, art dealers, painters and writers, in general however islanders and foreigners lived in parallel worlds. The contact between holidaymakers and the indigenous population, was influenced by the nature of tourism, 'charter tourism', located along the coast, and in so doing, summer visitors giving rise to 'enclave tourism'. Following the same author (1995), some foreigners were economically integrated, with the success of 'hippie markets' as an attraction. To quote Rozenberg (1995, p.170): 'Thus one can see the incorporation of the counter-culture taking place at two levels. On the one hand there is the symbolic use made of the presence of "freaks" in publicity films, guide books, the brochures of travel agents and postcards. On the other hand, this tourist activity, whether permanent or occasional, comes to be seen as an extra cultural asset in relation to the touristic value of the destination in addition the process of international tourism provoked on the islanders a reassessment of their own identity 'a succession of phases leads from rejection of local tradition to the reaffirmation of Ibician identity' (Rozenberg, 1995, p.170).

In so far, (Rozenberg, 1995) states that the rejection of tradition and cultural colonisation gave rise to words in foreign languages such as 'Jaime's'; 'Padre's'; or Angel's shop; meal-times; crepes; hamburgers, foreign newspapers, practice of

nudism; petty crime and drugs. After that the rediscovery and reappropriation of the past and the reaffirmation of identity of the Balearic Status of autonomy with its regional consequences.

Pearce (1995) argues that empowering visitors, training tourism professionals and educating the host community in cultural interaction are relevant actions 'in order to move from a paradigm of culture shock to one of cultural exchange, and hence ecologically sustainable sociocultural development (Pearce, 1995, p.143). His study (1995) presents scenarios for tourism development with sociocultural implications for groups of participants. These groups are:

- tourism community professionals;
- host community;
- visitors as culture seekers.

The author (1995) identifies specific educational research and human resource development strategies for each of these groups in order to obtain a proactive planned and sustainable model of cultural transactions. Moreover, in the process of educating host communities the author highlights that answers to several questions are required. Such questions, to quote Pearce (1995, p.150) are:

- 'Who is actually having contact with visitors?
- How much contact are they having?
- What are the types and ranges of situations involved in this contact?
- What are the community attitudes and responses to the contact?
- Are there any problems caused by the contact?
- Is the current level of contact likely to continue or is there a preferred future tourism community interaction scenario?'

The same author (1995) considers that in most communities, governments and the tourism public sector will need being leaders on the way of host community education, motivation and participation in order to maintain community support for tourism and 'mitigate' the negative impact of tourism's social contact upon the

residents. Within the framework of a communication paradigm and consequent communitarian involvement, Pearce (1995, p.151), argues: 'from the perspective of sociocultural sustainability the preferred outcomes of tourism community conflict are reconciliation, compromise and enhanced awareness'. In this sense, planning and researching sociocultural sustainability in tourism should be faced as a golden rule and great challenge for the 'emerging generations of tourism researchers'.

As a matter of fact, Costa and Ferrone (1995) identify key events in travel and tourism and point out emerging patterns for further research. They also highlight a period from 1989-1994 emphasising articles published in 'The Annals of Tourism Research' (Table 3.8) as a useful basis for research.

Levinson and Kumar (1995) outline 'the overall increase in the number of workers has meant higher per capita income and greater geographic mobility, but less disposable time, more travel, and more traffic congestion' (Levinson and Kumar 1995, p.581) and as a consequence individuals, to get the most out of every day, try to substitute money for time. Levinson and Kumar (1995) analyse 1968 and 1987-1988 metropolitan Washington, DC household travel surveys to know the allocation of time per day, among different activities of individuals, classified by work status and gender. They contend (1995) that with the female participation in the labour market an increase in overall time spent at work per person has increased. Moreover, to quote Levinson and Kumar (1995, p.58): 'The increase in work trips and the simultaneous increase in non work trips has resulted in less time spent at home. People are substituting money for time spent at home, buying household services outside the home'. Furthermore the group of persons working at home is analysed separately in order to have an understanding of this segment.

Authors	Focus	Sub-Theme
Dogan (1)	The reaction of hosts towards changes. Previously homogeneous communities characterised by a particular response to tourism become diversified.	Tourism as an inseparable part of modern life.
Husband (3)	Seeking residents' perceptions of tourism. How important differences in residents' perception of tourism are associated with the social structure of the region.	Social status and perception.
Perdue et. al., (4)	Support for tourism development linked to residents' perceptions of tourism impact.	Impact of tourism.
Laxson (5)	Tourist behaviour towards native "hosts" and the degree to which their perceptions of native American culture influence their stereotypic conceptions.	Evaluating other cultures.
Ap (2)	A social exchange process model to understand why residents perceive, positively or negatively, tourism impacts.	Residents' perceptions of tourism impacts.
Madrigal (6)	Research on rural residents' perceptions of community tourism development.	Tourism development
Wilson (7)	Changes in local perceptions: previous uncertainty about tourism development and its future acceptance.	Factors contributing to the changes in attitude.

Table 3.8 Hosts' Perceptions

Source: Costa and Ferrone, 1995, p. 28

Following Wall (1996) research on impacts of tourism has imperfections, which make difficult the development of a cumulative body of knowledge and the practical application of this body of knowledge. While much is investigated about the consequences of tourism for destinations in a broad sense, 'much less is known about the types of tourism which stimulate these changes and the contexts in which these changes occur. As a minimum more comprehensive typologies of tourism are required, incorporating types of tourists, community characteristics, the nature of visitor-resident interactions and the role of culture brokers' (Wall, 1996, p.207). Moreover the same author (1996) adverts the necessity to develop a research paradigm which highlights that tourism is only one among a number of agents of

change with impacts on communities and that it is artificial to abstract tourism from this broader context. Following the same author (1996) once this research is considered as a landmark in this area, impact is often used as a pejorative term and often assumed as negative. However residents quite often want tourism and tourists as a development option and advertise to attract tourists. They do so because they like 'their lifestyles to change'. They want:

- jobs;
- higher incomes;
- increased tax revenues;
- better opportunities for their children.

The same author (1996) asks this pertinent question: are the benefits worth that it is possible to maximise the benefits and, simultaneously to minimise the costs? The situation is complex but, on the other hand, impacts are quite often desired, difficult to evaluate, requiring sometimes trade-offs and in this case a policy framework may apply for adequate strategies in order to moderate undesirable impacts. Moreover, Wall (1996) states, the impacts of tourism can be viewed depending from:

- type or types of tourism;
- characteristics of the communities;
- nature of resident-visitor interaction.

In addition (Wall, 1996) research of tourism life cycles shows that impacts in a destination are likely to change with time as the nature of tourists, the community and resident-visitor interactions also change (Butler, 1980). As a consequence Wall (1996) contends, that cumulative impact assessment should be a useful tool for impact studies. On the other hand, Wall (1996) suggests to review the tourism impacts literature to capture the contexts in which authors have documented specific impacts. Failure in giving this information, 'or to take note of it adequately' has provoked:

- communication failures;
- contradictory findings;
- limited policy relevance (limited guidance to decision-makers);
- lack of salience for culture brokers;
- salience 'the salience of impacts refers to the importance of impacts, usually according to the views of residents of destination areas and usually ascertained through public opinion survey' (Wall, 1996, p.209);
- aggregated and desegregated measures 'Different types of impacts are measured in different ways. Social impacts may be assessed through surveys whose results may be presented according to the proportions of respondents agreeing or disagreeing with particular propositions. In such situations it is virtually impossible to come up with a single summary measure and to determine whether the benefits exceed the costs'. (Wall, 1996, p.209).

Thus, it is suggested (Wall, 1996) that the impacts literature has several imperfections and there is a need to:

- verify the tourist typologies which exist, much lacking empirical evidence;
- develop classifications of destination communities;
- examine resident-visitor interaction and the role of culture brokers;
- put the recording and monitoring of impacts in the context of all the above;
- assess the utility of planning and management concepts.

To quote Wall (1996, p.210): 'If such steps were taken, the quality of impact analyses and their comparability would be greatly improved and the body of knowledge might be cumulative rather than a series of case studies as is presently largely the case. The resulting investigations might also be more useful to planners and managers. However, by themselves they are insufficient to bring about more fundamental modifications in perspective which are required'. Furthermore (Wall, 1996) the dynamic of tourism is not like a billiard ball game upon a static community, being on the other hand, difficult to distinguish between internal and external forces of change. In addition it is very difficult to separate the consequences of tourism from other causes and agents of change and the milieu in

which changes happen should also be incorporated. To quote Wall (1996, p.213): 'Thus a broader conceptualization of change than the narrower perspective of impacts is required if the consequences and opportunities associated with tourism are to be more fully appreciated'. As a consequence, Wall (1996), suggests a new research paradigm assessing explicitly the true importance of tourism, different from existing impact paradigm.

Graham (1997) attempts, with carrying capacity and its concept, to examine its usefulness for achieving socioculturally sustainable tourism. He concludes the approach can have little 'practical usefulness' but is important to focus attention away from purely economic points of view. Moreover, he contends (1997), the concept of community involvement 'is strong in achieving increased attachment from residents towards a project and focusing attention on the people problems' (Graham, 1997, p; 24) and, on the other hand, he argues (1997, p24): 'In order to develop an approach which can attempt to nullify the impacts of tourism, it is essential to be aware of the full range of ways in which the local community can perceive disturbance to their society'

Lindberg and Johnson (1997) state that important contributions have been made recently to the understanding of tourism's actual and perceived social impacts in destination areas and the factors that affect resident attitudes towards tourism and the understanding of these impacts facilitates their incorporation into policymaking process. The contingent valuation method is presented as a technique for measuring the economic value of selected actual social impacts associated with the process of tourism development. To quote Lindberg and Johnson (1997, p.91): 'The focus is on deriving two sets of economic value estimates. The first set comprises value estimates for the benefits of mitigation programs. These benefits can then be compared to program costs, thereby enabling policymakers to determine the absolute and relative desirability of these programs. The second set comprises value estimates for impacts themselves, independent of mitigation programs'. As a consequence policymakers can incorporate these values as a framework for assessing tourism's overall desirability.

Faulkner and Tideswell (1997) describe a framework which has been designed for a comparative study of the social impacts of tourism in destinations along the eastern seaboard of Australia. The framework is tested on a case study involving the seaside resort called Gold Coast. They consider while the Gold Coast survey of resident reactions presented some relationships between variations in perceptions of tourism's impacts and variables such involvement in tourism, residential proximity to tourist activity and period of the residence, the most notable finding of resident reactions is the generally positive view of tourism importance in the area. It is concluded that the 'altruistic surplus' observed in urban planning research fits to tourism. To quote Faulkner and Tideswell (1997, p.26): 'The positive view of tourism among Gold Coast residents overall, and the marginal variation in opinion irrespective of such background variables as period of residence, place of residence and involvement, suggests that the altruistic surplus factor may apply to tourism'. And the same authors (1997) emphasise: 'In the tourism context, the altruistic surplus concept suggests that individuals tolerate any downside effects of tourism they might experience personally because they recognize the broader community wide benefits of this activity' (Faulkner and Tideswell, 1997, p.3). Moreover the same authors (1997) also conclude from the Gold Coast study that, contrary to the Doxey model, residents in big and mature tourist destinations do not become more hostile towards tourism, and on the other hand some communities adapt to tourism and develop a resilience which 'enables impacts to be accommodated'. The model suggested by Faulkner and Tideswell (1997) will be examined with further details in the context of attitudes. Meanwhile their conclusions can be summarised as follow:

The rationale of the study depends on three basic propositions:

1. The achievement of sustainable tourism development objectives at any location depends on, the implementation of a planning and management regime taking into account the social and community impacts of tourism, and also incorporating strategies for emphasising the benefits from tourism and minimising negative impacts;
2. A prerequisite for such an approach is the establishment of systems for monitoring resident reactions to tourism;

3. The establishment of monitoring systems depends from the development of a general framework used in comparative studies of different destinations.

The main objective of the research of Faulkner and Tideswell (1997) was to develop such a framework and to test it on Gold Coast. See Figures 3.5 and 3.6.

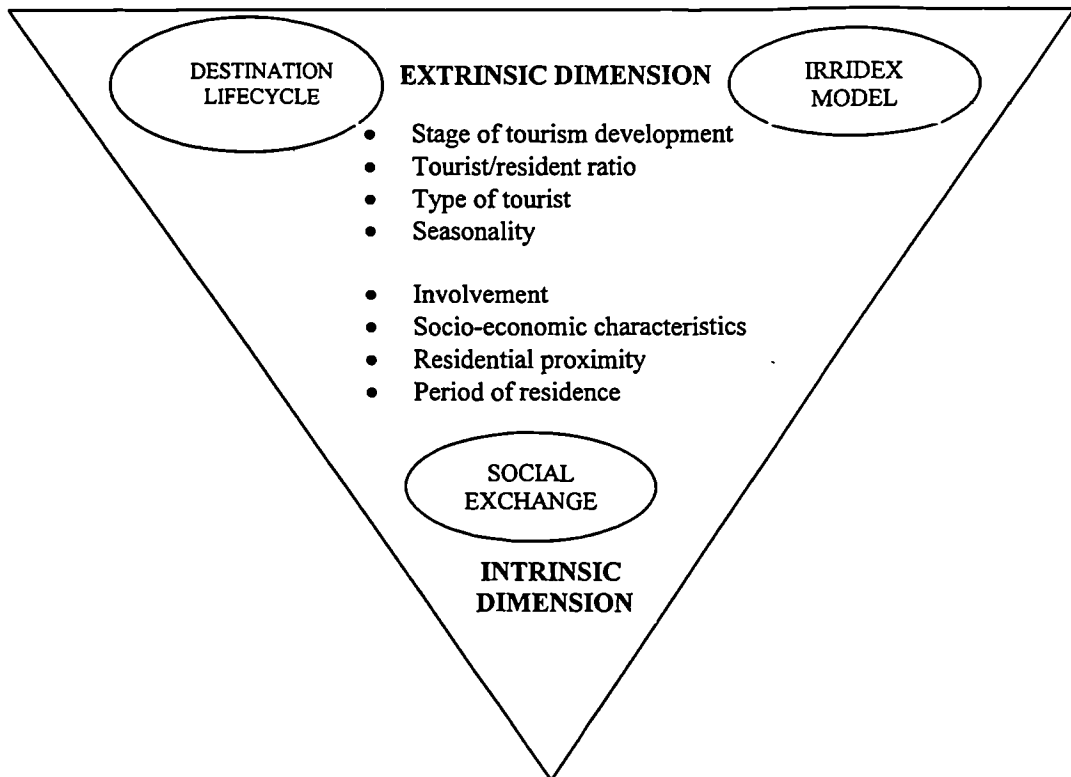


Figure 3.5 A Framework for Analysing the Social Impacts of Tourism

Source: Faulkner and Tideswell, 1997, p. 6

The framework uses several variables by classifying them as extrinsic and intrinsic. The relationships and interactions between these variables and community reactions to tourism were presented from a synthesis of theoretical and empirical contributions from previous research. The residents of the Gold Coast recognised the positive impacts of tourism to the region's economy, employment opportunities, the range and standard of services available, quality of life, cultural enrichment, community pride, environmental amenity and nature conservation. However, they were reticent regarding the cultural impacts of tourism and its effect on noise and traffic congestion.

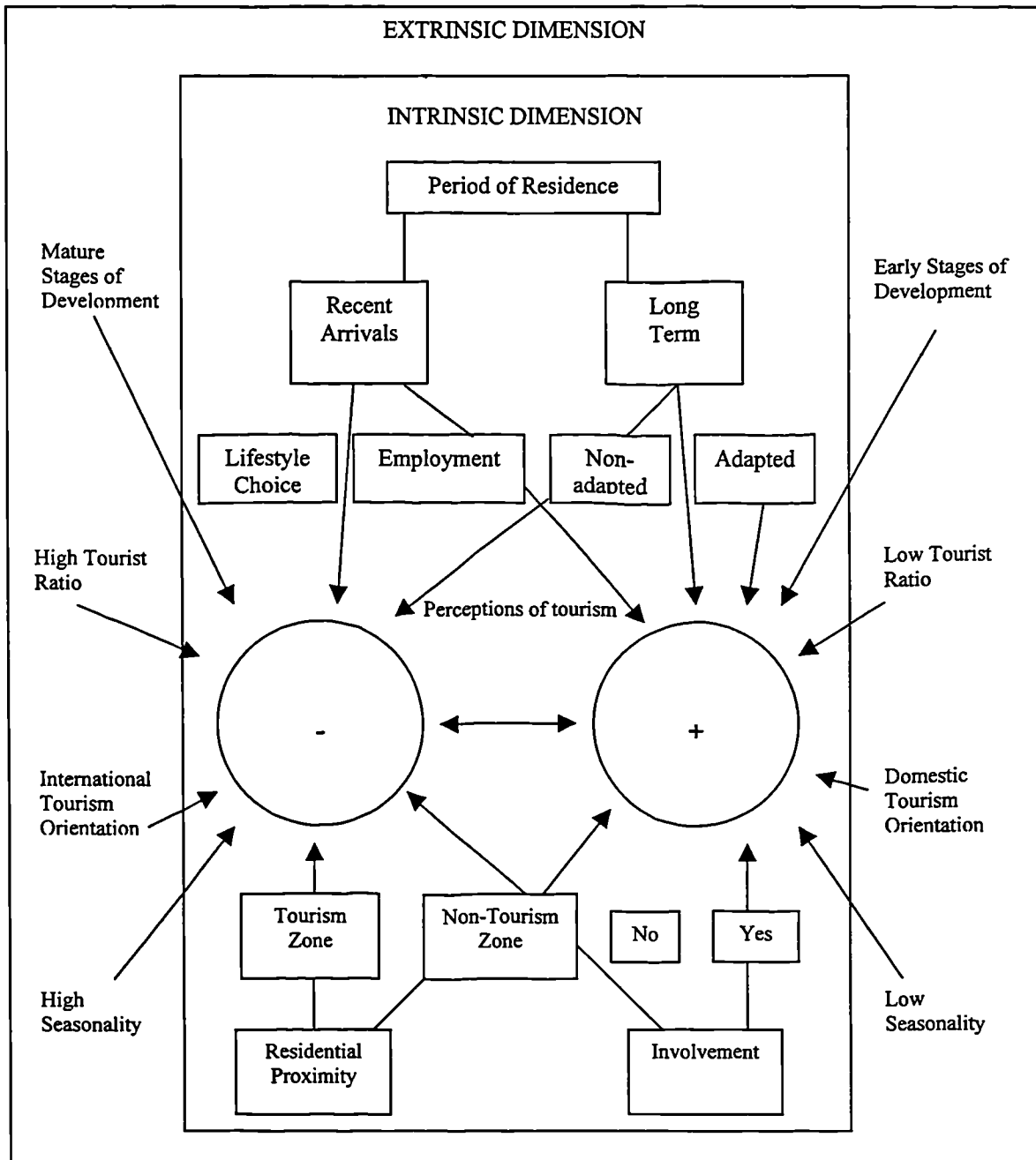


Figure 3.6 Factors Attracting Resident Reactions to Tourism

Source: Faulkner and Tideswell, 1997, p.10

There was also a consensus in responses to statements concerned with tourism's impact on the incidence of crime, disruption of peace, litter, degradation of natural environments, queuing for services and the cost of living. Faulkner and Tideswell (1997, p.26) conclude: 'On the basis of previous research, it was our expectation that, where there was a polarisation of views, this might be attributable to

variations in exposure to tourism associated with residential location or involvement. The proximity effect was significant in a partial sense only, with residents in tourism zones being more sensitive to negative impacts in a number of areas such as litter and disruption of peace. The involvement factor was found to have a significant bearing on how some benefits of tourism were viewed. This was especially so in relation to responses to statements regarding economic benefits, the distribution of these benefits and tourism's contribution to quality of life. In most of these areas, however, there was a relatively high level of agreement with positive statements among the non-involved population, although this group also exhibited a higher level of uncertainty'. In relation to residential proximity it was significant on perceptions, with residents living closer to the nucleus of tourist activity being more sensitive to negative impacts on issues like nature conservation, litter, and disruption of peace as has been already referred. Meanwhile according to the same authors (1997), the variation in responses dealing with location are marginal. Variations associated with period of residence were also considered marginal. From these findings, Faulkner and Tideswell (1997) advocate the theory of altruistic surplus as adequate for explaining the residents' behaviour as far as tourism is concerned.

3.7 Tourism in Small Islands

Up now this chapter has focused on the impacts of tourism in general. However this study is about tourism on island and there is a body of literature on island tourism (Lockart, Smith, Schembri 1993; Wilkinson 1994; Conlin and Baum 1995; Briguglio, Archer, Jafari and Wall 1996; Briguglio, Butler, Harrison and Filho 1996; Hall and Page 1996; King 1997; Batle 2000).

According to Butler (1993) small islands have long been considered as attractive places for both recreational and tourist purposes. The same author (1993) notes that their appeal can be related to separateness and difference from mainland destinations and "Where such physical separateness is accompanied by political separateness, the appeal can be expected to increase, and given people's desires for the different while in pursuit of leisure, different climates, physical environments

and culture can all be expected to further the attractiveness of islands as tourist destinations”(Butler, 1993, p.71). He (1993) states that the development of tourism on islands has prompted the interest of the academic community and much of the research about island tourism has been of the case-study approach lacking an overall conceptual framework. Butler (1993) presents an organic model for the tourist area cycle evolution. The same author (1993) in a paper presented at the *International Conference on Sustainable Tourism in Islands and Small States in the University of Malta (1993)* highlights that the development of tourism in many areas has been marked by too much growth, changes in the type of tourism and tourists, and often degrading the resources that attracted the tourists in the first place. As a consequence such problems contributed to the emergence of sustainable tourism and other types of tourism different to the conventional mass tourism. He (1993) contends that islands and isolated regions have been utmost affected by the success of tourism and in many cases they are the places, which could benefit most from sustainable tourism development.

Ritchie (1993) presents a *Special Report* with a discussion of the framework within which the Island Tourism International Forum was developed. This work of Ritchie contains a summary of the issues affecting island tourism. He (1993) contends that the identification of the major themes or issues provides an interesting reflection, which the Forum participants felt need to be taken into account by policy makers and managers over the next decades. The themes or issues identified were:

- concern for the competitiveness of island destinations;
- forces at work which have caused a decline in the viability and profitability of traditional island destination markets;
- the globalisation of societies – and particularly business practices – has been fueled by deregulation, privatisation and perhaps above all, by communications technology;
- the phenomena of globalisation has given rise to a reaction to which there is “a search for uniqueness and identity in a sea of homogeneity”;

- island destinations appear particularly threatened by globalisation and demographic shifts;
- the nature of the traveller has truly changed during the “golden age” of tourism (that is, since 1950);
- the individual tourist is an ever changing “wily coyote”;
- concern for the environment is now “centre stage” and genuine. From now on, it is inconceivable that any significant scope will be undertaken if its environmental consequences are unduly negative;
- island destinations need to view tourism development in an integrated manner in relation to other sectors of the economy (such as agriculture, fishing, manufacturing);
- from a business perspective, we are entering a new age of information for decision making;
- human resources development continues to receive internal dip-service but “where’s the beef”.

In addition Ritchie (1993) states that the limited capacity of an island means that the managerial task is more difficult. To quote Ritchie (1993, p.305): “In brief the managing of island tourism destinations is a delicate and demanding task. The destination must be competitive while remaining sensitive to the values of the local culture and the fragility of the small economy, which surrounds it. To be successful, a genuine understanding of the factors affecting island tourism needs to be achieved”.

Wilkinson (1994) emphasises that tourism resource is not a single “good” or “service” but a bundle of goods and services, natural and human, social and cultural, economic and spiritual, fact and fiction and in addition systemic and contextual .The same author (1994) contends that resource management is about power and politics. Furthermore and to quote Wilkinson (1994, p.46): “There has been very little in-depth comparative work focusing on the historical development

of tourism resource management policies and planning in order to see whether there were common threads in tourism across islands or whether each case is unique”.

Edgell (1995) considers that there are challenges of island tourism in the global arena and highlights “nine shadows of the 90s”, which will address some of tourism concerns of island destinations. These “shadows” can provide tools to both island markets and assist in the formulation of international-oriented island tourism planning and management programmes. These “shadows” are:

- international co-operation;
- the enormous potential size of international tourism growth;
- the shadow of change;
- challenging the competition;
- communication and transportation technologies;
- health, security and safety;
- human resources and training;
- diversity;
- interdependence and the environment.

Conlin and Baum (1995) identified the following main island tourism issues:

- tourism planning and policy development;
- tourism and sustainability;
- marketing issues;
- competitiveness.

As a consequence they present chapters exploring these above areas of reference, which pervade the tourism in island destinations.

Murphy (1995) suggests that while the combination of island and urban tourism may appear to be an “oxymoron” the two concepts go together in tourism

management. Also, Murphy (1995), contends that the link between island urban locations and visitors can be “traced to the early settlements, where invaders or colonists established the first toe hold in their new environment. Such settlements were often based on the presence of safe harbours, good water supplies and arable land that would support a growing population” (Murphy, 1995, p.167). The same author notes that these locational determinants influence the urban pattern of the islands, and also they created the attractions and infrastructure for the development of tourism. Murphy (1995), in addition, points out that there are both a sense of place and scale associated with smaller islands and furthermore islands hold a special place in people’s mind, associated with isolation, insularity and distinctiveness. In addition, due to their small size and insular populations these “microcosmo” are particularly vulnerable. Lastly, Murphy (1995, p.178) suggests that “The relationships which exist between island and urban tourism will encourage further investigation and development of this synergistic partnership. This in turn may help the microcosm societies of our islands prepare themselves more thoroughly for the delights and frustrations of modern tourism”.

Butler (1996) discusses the concept of sustainable development in the framework of tourism development highlighting the issue of tourism in islands. He suggests (1996) both some alternative definitions of sustainable tourism and tourism in the context of sustainable development, pointing out the difficulties of island communities in achieving sustainable development in the field of tourism. In addition Butler (1996) adverts that the problems in developing tourism in a sustainable way are aggravated as far as islands are concerned, due to a number of common issues and problems. According to the same author (1996) they can be summarised as follows (with relevance for exploring Madeira big picture):

Problems

- islands and peripheral regions are more vulnerable to impacts;
- limited local market, critical mass and poor communications;
- dependence on intermediaries;
- over-dependence upon tourism in many cases;

- the smaller the island, the less control residents have over the nature and scale of development;
- the development is dominated by external influences and controls.

Capacity

- limited numbers and carrying capacity at stake;
- small islands as main cases of tourism pressure upon resources, environment and residents;
- the innate appeal of islands to tourists.

Access

- limit to numbers of visitors caused by location and relative difficulty of access;
- capacity for controlling the numbers, type and scale of tourism development;
- dependence on tour operators;
- residents having awareness of the problem but having an ambiguous attitude because the reduction of tourism activity would have negative impacts.

Attitudes towards Development

- encouragement of growth in tourism rather than limiting it;
- NTOs and the concern for marketing and promotion;
- Few have mandate to determine carrying capacity or limiting numbers;
- Tour operators and others desire increased growth.

Nature of Tourism

- Tourism based on natural attractions (flora and fauna, local culture, landscape and marine resources) is more linked with sustainable development.

Control of Tourism

- Control over planning and development;
- Control of the means of access and market;
- Local authority has power and control over development or promotion of the island as a destination.

Policy Options

- Need for tourism policy;
- Reducing impacts;
- Three options:
 - policy of insulation and containment (ghettoes);
 - policy of integration and absorption;
 - policy of accepting change.

The same author (1996) before presenting the Shetland Islands as a case study, summarises (1996, p.20): “The above discussion has identified a number of issues and problems, which, it has been argued, are significant in determining the likelihood of island destinations achieving a form of tourism which is essentially in line with sustainable development principles”.

Batle (2,000) discusses the recent policy initiatives in the Balearic Islands, which integrate both land and tourism planning aiming to achieve sustainability. In effect The Pla de Ordenacio de L’Oferta Turistica (POOT), or tourism regulation plan “aims to regulate all activities that have impacts on tourism supply, to rearrange it through restrictive space planning, and thus to protect the environment”(Batle, 2000, p.524).The POOT has automatic validity and town planning has to be adapted to support it. The same author (2000) notes that the extent to which the Balearic model is applicable to other destinations is difficult to assess because the situational factors are quite unique but he contends that the mix between land use planning and tourism management is necessary in mature destinations. Moreover and to quote Batle (2,000, p.525): “The process has been a centralized one, involving the participation of all tourism agents. Therefore, it deserves special consideration”.

Madeira is an important candidate for the considerations made above and moreover offers its principal assets: attractive scenery, beautiful gardens and flowers, cleanliness, pleasant climate, relaxing and restful, security, safety and friendly residents with a sense of place and pride that make Madeira both being distinctive and an attractive destination. On the other hand Madeira did not adopt and

implement a specific policy of sustainable development but this is mainly due to past history, location and environmental circumstances. However, a compromise between mass tourism and sustainability as a guiding principle seems to be a matter of fact, in the latent frame of reference of decision-makers, residents and private sector.

Clearly the literature suggests that islands present some special issues for tourism and for tourism development. In brief some of the impacts of tourism are compressed and may be magnified by the small scale of the destination. In many ways this makes them interesting locations to explore the impacts of tourism. The range of studies of island tourism bears witness to this. It also suggests that the impacts need to be well understood and met by appropriate reactions, particularly in the form of policy initiatives, if tourism is to be successful. It is against this background that Madeira presents itself as the location of the fieldwork for this examination of social impacts and associated policy implications.

The chapter examined the social and cultural impacts, as well as the consequences of tourism on communities. Tourism creates both positive and negative impacts on the destinations and their residents. Those more critical of tourism impacts tend to advocate that tourism negatively affects social and cultural resources damaging both communities and residents. On the other hand, a more optimistic approach views tourism as a positive agent of change on social and cultural behaviour of local populations. However policy-making and planning can contribute to minimise or eventually remove negative impacts. The main challenge seems to be balancing tourism development to bring long-term benefits to residents, tourists and the private sector.

This research examines social and cultural impacts and consequences of tourism. Residents' attitudes towards tourism is carried out by attitudinal surveys of residents for obtaining adequate information. The next chapter will discuss in more depth the literature on attitudes in general and specifically related to residents living with tourism.

CHAPTER 4

RESIDENTS' ATTITUDES

4.1 Introduction

This chapter emphasises the attitude of residents towards the social impacts and consequences of tourism. The focus of the chapter is the importance of residents' attitudes towards tourism. Several theories are presented dealing with attitudes of residents to tourism and a community approach is considered for developing stakeholder tourism.

The main reason for paying attention to the effects of tourism is that tourism development provokes impacts. If information about impacts is relevant, one aspect of the social impact research which has been investigated and which provides paramount information is the relationship between attitudes towards impacts and consequences of tourism development from the point of view of residents. Moreover the objective of this research is to assess the attitude of residents of Madeira to tourism to the island and also to explore the views about consequent tourism policy. In so doing the aim will be embracing the future development of the island with a framework of tourism development policy including residents' perspectives.

This chapter aims to review the tourism literature about residents' attitudes to tourism impacts and its consequences in order to understand both what is already known and what is not known about this topic

4.2 Literature Review

Pizam (1978) contends that most impacts of tourism research have been dominated by economic analysis and benefits upon a destination and recently a move has taken place on negative impacts. Moreover, he points out (1978) that an Attitude-Index was created by averaging the scores of residents and entrepreneurs of Cape Cod, Massachusetts, as one of the first attempts to examine empirically the existence of negative impacts, their correlation's and results. This study of Pizam (1978, p.9) being 'on exploratory nature hypothesized that heavy tourism concentration in a

destination area might lead to negative resident behaviour towards tourism. It was expected that the residents' attitude towards tourists and tourism would be a function of the residents' economic dependency on tourism. Additionally, it was anticipated that the residents' and the entrepreneurs' overall attitude toward tourism would be a function of certain socio-economic demographic characteristics such as age, income, occupation, place of employment etc'. The conclusion of this study shows strong support for the hypothesis that big tourism concentration in a destination causes negative resident attitudes towards tourists and tourism in general. This research also confirmed the 'hypothesized relationship between an individual's economic dependency on tourism and their overall attitude toward tourism. It was found that the more dependent a person was on tourism, as a means of livelihood, the more positive was his overall attitude toward tourism on Cape Cod' (Pizam, 1978, p.12). Furthermore, this exploratory study 'was successful in locating those factors in the community which are most negatively and positively impacted by tourism' (Pizam, 1978, p.12) and also 'moderately assisted in a better understanding of the contribution of residents' and entrepreneurs' profile variables as possible predictors of attitudes towards tourism ' (Pizam, 1978, p.12).

Dean and Wu, (1979) note that the development of tourism can have physical, social and economic impacts and some of these impacts, with many variables, are both difficult to quantify and sensitive to policy or other difficult-to-predict interventions. Moreover, Dean and Wu point out the involvement of residents in an impact assessment, can be useful to both forecast and appraise these more complex impacts. They indicate some group discussion techniques, such as Delbecq procedures, Delphi and IMPASSE as being adequate to identify the potential and complex impacts, and in so doing, helping both planners and decision-makers (1979).

Belisle and Hoy (1980) in a case study in Santa Marta, Colombia, identify the positive and negative aspects of tourism as perceived by residents, and the importance of selected variables on resident response. The same authors (1980, p.87), used two hypotheses:

- 'a) The perception of tourist impact varies with the distance a person lives from the tourist zone (defined as a three-street ribbon extending along the Santa Marta beach). It is thought that the further residents live from the tourist zone, the less contact they will have with it, thus forming different perceptions of the impact of tourism.
- b) The perception of tourist impact varies with the resident's socio-economic status. It is supposed that certain socio-economic classes derive more benefits from tourism than others; hence, some classes may perceive tourism in a more positive manner than others'.

Taking into account the finding of the study, the first hypothesis is accepted. Distance is the only variable 'affecting significantly ' the perception of tourism impact. The second research hypothesis is rejected. To quote Belisle and Hoy (1980, p.95): ' The small socio-economic variance in response may indicate that all groups find some direct or indirect benefits in tourism, from the upper-class entrepreneurs to middle class businessmen and lower-class waiters and custodians. Direct and indirect tourism benefits which accrue to the lower income groups of population may be less in absolute terms than they are for middle and upper-income groups and yet, in relative terms, be important'. Belisle and Hoy (1980) also note that the positive attitudes of the Santa Marta residents toward tourism may be a function of the 'incipient stage' of tourism development in the destination.

Pearce (1980) assessed anticipated reactions to foreign visitors in an area being taken into account for a tourism development programme. In this study although a high level of acceptance was predicted by residents, over 11% of the 846 respondents anticipated negative reactions in their community. In the same study, Pearce analysed the possible relationships between thirteen demographic and socio-economic characteristics of the respondents (occupation; years of residence in the country; location of residential area; employment status; marital status; number of children living at home; religious preference; age; education; sex; home ownership; income and race) and their expectations regarding residents' acceptance of tourists from foreign countries, presented only one significant relationship. To quote Pearce (1980,

p. 229): 'Survey participants who reported living in urban areas assessed the community's probable reaction to foreign travellers most positively, while a movement away from urban centres was associated with more negative expectations'. Pearce (1980) advocates that replication and extension studies should be conducted in order to better respond to two relevant questions dealing with issues of residents' community acceptance of international tourists:

- '1. What are the relationships between acceptance of foreign travellers and resident demographic and socio-economic characteristics, when moderated by prior exposure to foreigners, the community-resident/foreign-visitor ratio, or the economic dependency of the community upon the tourist industry?
2. What behaviours are exhibited by host community residents in evidence of varying degrees of foreign-tourist acceptance?' (Pearce, 1980, p.231).

Answers to these questions should improve understanding of residents' resistance to tourists but also support better prevention and adequate strategies, enhancing the hospitality of the destination.

Brougham and Butler (1981) indicated, in a study undertaken in Sleat, Scotland, that costs and benefits from tourism do not 'accrue equally' to residents of destination areas. By profiling residents via segmentation analysis, they concluded that residents' attitudes differed in terms of age, language, length of residence, amount of tourist contact and personal and locational contacts, being such variations in reactions to tourism relevant 'to the success or failure of the industry'.

Duffield and Long (1981) examine the impact that tourism may have on peripheral regions, based on the Highlands and Islands of Scotland, while also having in mind the experience of other areas. Tourism is considered as a development option and evaluated as an economic, social, cultural and political trigger to permit an assessment of its impacts on residents. Moreover, Duffield and Long (1981) also recognise that tourism may be related with both costs and benefits in the same community and it should not be seen as a monolithic enterprise. Furthermore, they stressed (1981) the

importance of the linkages between the stages of development of tourism and the responses of the host population in order to ensure most adequate form of tourism development, consistent with the local values and reinforced by local perceptions of costs and benefits.

Loukissas (1982) highlights the conditions that cause tourism development and theorises how these conditions trigger the amount of impacts on host communities. Thirty-eight Greek islands were statistically analysed based on secondary data and a smaller sample was studied in more detail through a comparative case-study approach. Tourism impacts were seen to be positive in larger islands, where the level of differentiation is capable of handling high volumes of tourist activity. In smaller islands with high tourist activity, tourism was seen to create unstable, short term impacts characterised as dualistic development. Therefore, tourism 'effects can be interpreted as benefits for some and costs for others in the community. Consensus among various local interests is difficult to achieve. It is the lower and middle classes that tend to be for the promotion of tourism development, because of its economic gains, while the upper class tends to be against excessive and uncontrolled development because of its sociocultural and environmental costs' (Loukissas, 1982, p. 538). The same study concludes that factors such as the local institutional capacity to absorb development, the potential interaction between local and tourists, the integration of the tourism industry with the rest of the economy and a more locally oriented policy system with local participation in the decision making process should be considered in the making of tourism policy.

Getz (1983) comments that many factors can determine the attitudes of host populations and at some point there might arise a mainly negative reaction which will threaten the tourist industry. Furthermore, he argues (Getz, 1983, p.247) that 'the preferences of a host population could be allowed to dictate the types and amounts of growth and change, and an emphasis on local attitudes implies that regional and national objectives might be sacrificed.' Also Getz (1983) points out that the attitudes of a host population will be one of many factors taken into account in the decision

making process, and if democratic principles are respected, the residents will be given adequate input.

Loukissas (1983) considers that the degree of participation is related to the public's attitude and behaviour and public participation is a fundamental part of a successful tourism development plan. Moreover, Loukissas contends that the individual having a say, is a part of the democratic system, and the political support by citizens is essential for the achievement of long term community management. The same author reviewed selected simulation games useful to the tourism development process.

Haukeland (1984) presented a Nordic case study on the impacts of tourism upon three host communities: Hemsedal in Norway; Salen in Sweden and Blokhus in Denmark. The objective was to analyse different aspects of the relationship between the growth of tourism and its impacts upon the three host communities. Haukeland (1984) found empirical support for its assumptions. To quote the same author (1984, p.214): 'There was in fact, a more negative attitude towards continued growth in tourism in the most developed regions. In the different districts, however, the informants emphasised different aspects when explaining the reason for their negative feelings. These differences could be understood in terms of the specific social structure and the cultural traditions in each community, which became visible to us throughout the study, and also as a result of the characteristics of tourism on the local level. We also found differences in opinions within the individual communities. Persons working in the more traditional industries and also people not working (i.e., housewives, pensioners, etc.,) expressed the most critical viewpoints. This broad group has its roots in the old social structure of society - with its corresponding traditional value orientation. The more liberal attitudes were found among people representing the new sectors of society (i.e., younger people undergoing education, people working in service industries. This group is also most urban oriented in its socio-structural position, and its view of the world is highly influenced by tourists when some sort of economic or social link is established'. Var et. al., (1985) aim to determine social impacts of tourism as perceived by residents in a small community called Marmaris, on the south western Turkish coast. They conclude that visitors from more distant

origins were ranked more favourably than visitors from closer areas. For example tourists from Middle Eastern countries, as well as Turkish workers abroad and domestic tourists, were the least preferred ones by the residents of Marmaris. The same authors (1985, p. 657) argue 'These results represent a delicate situation that must be tackled by the Turkish tourism authorities. During a period of increased efforts to attract more tourists from the Middle East and Turkish workers abroad, residents' unfavourable stereotyping must be seriously considered and an effort to educate the public must be treated as one of the alternatives in dealing with this problem'.

Witter (1985) investigated a resort comparing the attitudes of tourists and local retailers. Retailers evaluated their resort area more favourably than tourists. Moreover, segment profiles of tourists were built up from the responses of tourists and compared with retailer's perceptions of tourist segments. Following the same author (1985) the results indicate that retailer residents and tourists have different approaches of what tourists seek in a vacation destination. On the other hand the 'proud parent syndrome' was evident in the retailers' evaluation of their resort area; the retailers evaluated Traverse City more favourably than tourists and in addition believed that most attributes were more important than did the visitors in selecting a destination.

Maddox (1985) examined the construct validity of several methods of measuring satisfaction towards tourism in Nova Scotia and concluded that one of the measures performed better - the delighted - terrible (DT) scale, than others, which did not perform so well. The study has consequences for both management and promotion of tourism.

Liu and Var (1986) stressed resident attitudes to economic, sociocultural, and ecological impacts of tourism development in Hawaii. A questionnaire was designed asking questions on tourism development and impact, including economic contribution, educational contribution, social and cultural effects, environmental effects, government planning, living conditions of residents, stereotyping of tourists,

preferences for specific tourists, foreign investments, as well as demographics of respondents. The conclusions of Liu and Var (1986, pp. 211-213) can be summarised as follow:

1. Strong perception of the positive economic benefits of tourism. Less obvious finding on the cultural benefits and ambivalence toward the environmental benefits;
2. Residents, surprisingly, are reluctant to attribute social and environmental costs to tourism and tourists;
3. Significant variation among respondents by demographic subgroups, with the exception of length of residence and ethnicity is generally low. Among the eight demographic categories, length of residence and ethnicity are the most important, requiring further research;
4. Residents consider environmental protection as being a more important concern than the economic benefits of tourism but do not wish to lower their standard of living in order to obtain this goal. When asked how dollars should be spent, the priorities were ranked: crime prevention, environmental protection, tourism promotion;
5. Hawaii is a special case study, a 'melting pot of the Pacific' requiring further research the ethnic breakdown, length of residence and other demographic variables;
6. This study highlights the community-oriented approach providing consequent feedback's for tourism policy.

Surprisingly, and to quote Liu and Var (1986, p.201): 'Respondents who work in the industry did not respond differently from those who hold non tourism-related jobs, except in the case of comparison of tourism revenues with military revenues. This result is counter to Pizam's study (1978) which showed that more positive attitudes were found for workers in the industry. A possible explanation is that in a mature destinations like Hawaii where tourism is so dominant, few residents are unaware of the importance of the industry '

Ahmed (1986) stresses the reaction of Sri Lanka residents to foreign tourism. The objectives of this research are threefold. According to Ahmed (1986, p.14): 'They are:

- (a) to access the English-speaking Sri Lankans' beliefs about the Sri Lankan tourist product, their perceptions of tourism's socio-economic impact and their attitude towards various revenue-generating strategies;
- (b) to correlate product beliefs and impact perceptions with tourism revenue generating strategies; and
- (c) to uncover and interpret different tourism revenue-generating strategies favoured by the English-speaking Sri Lankans' through a canonical correlation procedure'.

The same author (1986) notes that despite studies conducted to measure tourists' perceptions of product benefits in Sri Lanka and the impacts of tourism upon the Sri Lanka economy no research, to date, measures the relationship between the residents' perceptions of tourism and their attitude to the development strategies that may be chosen. Ahmed (1986), after highlighting how the perceptions and attitudes are related to strategic approaches to development of tourism, stresses derived consequences for strategic marketing planning.

Perdue et. al., (1987) examines the importance of participation in outdoor recreation upon the tourism perceptions and attitudes of rural residents. To quote Perdue et. al., (1987, p.421): 'Focusing on residents of five rural communities with established outdoor recreation-oriented tourism industries, the purpose of this paper is to examine differences in tourism perceptions and attitudes, comparing participants and non participants in camping and fishing. Three general types of tourism questions are examined: the perceived impact of existing tourism, the desirability of additional tourism development, and the appropriateness of special tourism taxes'. Following an issue of social exchange theory, it is hypothesised that outdoor recreation participants, compared to non participants, perceive more negative impacts from tourism and, as a consequence, have less favourable attitudes to further tourism development and more favourable attitudes towards the appropriateness of special tourism taxes. According

to Perdue et. al., (1987) the data did not support these hypotheses. There were no substantial differences in the tourism perceptions and attitudes of outdoor recreation participants in relation to non participants, may be due to coping mechanisms from participants in order to avoid competition with tourists for outdoor recreation enjoyment. Moreover the same authors state that resident attitudes towards tourism are a dynamic concept, with changes and adjustments in resident recreation behaviours. Meanwhile the same authors note that the importance of maintaining the quality of the outdoor recreation was, supported by the data. To quote Perdue et. al., (1987, p.428): 'Those individuals, including both participants and non participants, who perceived that tourism was negatively impacting upon the local outdoor recreation opportunities had significantly less favourable attitudes toward additional tourism taxes. Tourism development should thus, be particularly careful not to damage the integrity of local outdoor recreation opportunities'.

Um and Crompton (1987) indicate a method of measuring residents attachment levels to a host community. They conclude that there were negative correlations between residents' perceptions of tourism impacts and their attachment level. With the exception on the environmental quality of their community, the more attached residents were to the community in terms of birthplace, heritage and years of residence, the less positively they perceived the tourism impacts and its consequences on their destination area. Also Um and Crompton (1987) conclude that residents are not homogenous and new residents may have different perceptions of tourism impacts than old residents.

Liu et. al., (1987) focused resident perceptions of tourism impacts in three case studies in Hawaii, North Wales and Istanbul, enabling cross-national comparisons. The study stresses some geographically specific concerns. As Liu et. al., (1987, p.35) put it: 'In Hawaii and Wales where tourism is a significant part of the economy, residents are primarily concerned with the negative impacts on their environment. The Welsh are also concerned over purchase of property by foreigners. In contrast in Turkey, which hopes to expand its tourism, respondents are concerned with development of facilities, hospitality, and promotion.' Moreover, the results from the study (Liu et. al., 1987)

suggest that residents living in destinations with a more mature tourist industry are more aware of both the positive and negative environmental impacts of tourism and its consequences. In addition the residents 'are highly aware' of the role of government planning in the long-term protection of the environment and on the other hand the same study confirms the importance of adopting a holistic approach to tourism planning with incorporation of resident perception in evaluating the effects and consequences of tourism development.

Milman and Pizam (1988) investigated Central Florida residents' perceptions of the social consequences and impacts of tourism. The survey revealed that residents not only supported the tourism industry but also favoured its expansion. However this positive feeling also identified some positive and negative impacts upon their community. Furthermore, the same study emphasised a relationship between support for Central Florida tourism and residents' perceptions of the consequences of tourism. The same authors also highlighted a concern for cross-national comparisons.

Davis et. al., (1988) assessed and segmented local Florida residents in relation to their attitudes, interests and opinions toward tourism. To quote Davis et. al., (1988): 'The present study was designed to assess the general public's attitudes towards tourism. More specifically, the study was designed to

- 1) assess the perceptions and attitudes of Floridians towards tourists and tourism in general;
- 2) identify the extent of negative and positive perceptions of residents towards tourism;
- 3) classify residents on the basis of their attitudes towards tourism; and
- 4) profile the classified residents on the basis of their demographic characteristics'.

The conclusions of Davis et. al., (1988) can be summarised as follows:

1. There are five segments of local residents regarding their attitudes, interests, and opinions toward tourism. The five clusters are ordered on the basis of the

segment's degree of negativity towards tourism and consequences for public policy;

2. The study shows a strong positive relationship between knowledge of tourism's impact on the economy and appreciation of the tourism industry;
3. There are distinct psychographic segments, but demographics were of little importance in describing segment membership with the exception of residents born in Florida;
4. There is a need to educate residents about the positive effects and consequences of tourism.

The conclusions of David et. al., (1988) have implications in terms of planning and tourism policy. To quote David et. al., (1988, pp. 7-8): 'The last major implication is that tourism promoters within the state, country, or city should not ignore the public's attitudes towards tourism. Stimulating tourism does little good if local residents give tourists a bad experience. Furthermore, local or state referendums designed to help promote tourism will receive little support if the public does not know or believe that the industry has many positive benefits for their daily lives'.

Ritchie (1988) aims to contribute to the development of a framework for consensus policy formulation in tourism. The study methodology is designed to take into account the views of the population, complementing an earlier work using the normal group technique approach. As Ritchie (1988, p.212) says: 'Two specific observations concerning the use of survey research in a process of policy formulation and programme development in tourism should be noted. First the general population appears quite willing and capable of providing its views on both general and specific dimensions of tourism related issues. Second the survey methodology employed takes much of the workload off the residents supplying their views, and transfers it to policy makers'. Ritchie (1988) also notes, as a concluding remark, the methodology used should supply policy makers with useful reading of how the residents view tourism and tourism development.

Allen et. al., (1988) investigated whether residents' perception of community life satisfaction vary with levels of tourism development. The seven dimensions of community life, outlined by the authors, were: public services, economics, environment, medical services, citizen involvement, formal education and recreation services. The conclusions point out (Allen et. al., 1988) that the relationship between tourism development and satisfaction or importance of community dimensions is mainly non-linear with citizen involvement, public services, and the environment being most sensitive to tourism development and as a consequence 'Tourism managers and developers and public officials must recognise these impacts and establish comprehensive efforts to ensure maintenance of public services, preservation of the environment and opportunities for public involvement where a sense of camaraderie and citizen control can be maintained even in light of increasing tourism activity' (Allen et. al., 1988, p. 20). Moreover, this study shows a positive relationship between community size and residents' perceptions of community life, considering residents as partners of the development process.

Husbands (1989) conducted a survey in Livingstone, Zambia, with the objective of ascertaining residents' perception of tourism. The conclusions from the survey show that respondents were not very enthusiastic about tourism. However, important differences were seen as being associated with social status and social class cleavages, with priority given to social structure and not only to individual socio demographic variables. As Husband (1989, p.251) says : 'In Livingstone, the local bourgeoisie is favourably disposed to the idea of tourism consumption, while urban workers (sales/service) have rejected tourism as a desired item of consumption. This distinction forms the basis for the divergent views regarding tourism which are associated with education and age'.

Perdue et. al., (1990) present a model of the relationships among rural resident perceptions of tourism impacts, support for further tourism development, restrictions on tourism development and support for special tourism taxes. The survey was carried out in 16 rural Colorado communities. As part of the study the authors stressed 4

major hypotheses of the model of tourism perceptions and attitudes, which can be summarised as follows:

1. When controlling for personal benefits from tourism development, tourism impact perceptions would be unrelated to residents' characteristics. The results supported this hypothesis;
2. Even when controlling for personal benefits from tourism development, support for further tourism development would be positively related to the perceived positive impacts of tourism and negatively related to the perceived negative impacts. The study results supported this hypothesis;
3. The study hypothesised that support for further tourism development would be negatively related to the perceived future of the community. The results also supported this hypothesis. To quote Perdue et. al., (1990, p.597): 'It appears that resident support for tourism development is something of a "doomsday" phenomenon. When the rural economy is perceived as deteriorating, residents appear more likely to support tourism';
4. It was hypothesised that support for restrictive tourism development policies and special tourism taxes would be negatively related to support for further tourism development. The results partially supported this hypothesis. To quote Perdue et. al., (1990, p.597): 'Specifically, support for restrictions on tourism development were negatively related to support for additional development. However, there was no relationship between support for special tourism taxes and support for tourism development. More importantly, support for both tourism development restrictions and special tourism taxes was positively related to the perceived negative impacts of tourism and the perceived future of the community. Those people who perceive tourism as resulting in negative impacts appear more likely to support restrictions and taxes on tourism.'

The applied consequences of this study emphasise the importance and design of public relations campaigns aiming to achieve resident support for tourism

development. On the other hand this study focuses on one variable that is very difficult to control, 'the resident's perception of the community's future'.

Keogh (1990) seeks insights into the information needs of residents of destination areas for more community involvement in tourism planning. It is suggested that the lack of familiarity with development proposals among residents might have adverse effects on attitudes towards tourism projects. Moreover, and as Keogh (1990, pp.463-464) points out: 'The study illustrates the contribution that this type of survey can make in the early stages of a public participation program. By identifying the issues at stake in a community and the different interest groups involved, insights can be obtained with respect to the information needs of residents and guidelines prepared for meeting them'.

Ap (1990) considers that an aspect of social impact research, which has been investigated, and a good provider of information for tourism planning is resident /host perceptions of tourism, despite lacking a sound body of knowledge about the social impacts of tourism and their measurement. Moreover, the central concepts of the study were not anchored to some explicit theory with consequences in the development of a central framework. In addition, Ap (1990) advocates the relevance and application of social exchange theory for exploitation in future research, aiming to measure social attributes of tourism. He contends (1990) that more attention should be paid to some issues, with the objective of transcending the descriptive stage towards an exploratory one. The issues suggested for this are:

1. Cultural and economic distance between host and tourists;
2. Intensity of tourism development and growth;
3. Influence of economic dependence on tourism and attitudes towards tourism;
4. Longitudinal research of resident perceptions, especially over the various development phases of a destination area.

Ap (1992) presents a social exchange process model as a theoretical basis for some understanding of why residents perceive tourism impacts positively or negatively. The

model is supported by the exchange relation. Propositions are derived from the model to test it, which have been developed from inferences based on the social exchange literature. Ap (1992) argues that the term perception is used to describe resident dispositions towards tourism instead attitude. Moreover, he suggests (1992) that residents evaluate tourism in terms of social exchange, that is, in terms of expected benefits or costs, obtained in return for the services they supply. On the other hand it is assumed that residents, as actors and players, seek tourism development in order to satisfy their economic, social and psychological needs and to better the community's well being. To quote Ap (1992, p.669): 'Even for those in a community where tourism is forced upon them by others against their wishes, there is still an opportunity for them to evaluate the exchange, since it can be viewed as a dynamic process. In such instances, it is likely that the exchange will be perceived negatively because there is an imbalance of benefits and costs share between the actors and any stability in the relationship, in terms of motivation and loyalty, is not maintained'. However, benefits derived from exchange may be perceived by residents as outweighing the costs, and 'perceptions may change to a more positive disposition', despite some initial reaction to the contrary. In addition, actors are described as the participants in an exchange and the satisfaction of actors needs, provides the rationale for engaging in social exchange. On the other hand, within this framework 'it is suggested that when exchange of resources (expressed in terms of power) between residents and tourism is high and balanced, or high for the host actor in an unbalanced relation, tourism impacts are viewed positively by residents. When exchange of resources is low in either the balanced or unbalanced exchange relation, the impacts are viewed negatively' (Ap, 1992, p. 685). In addition, the model presents support for explaining the process involved in social exchange and propositions, which provide a basis for testing the model.

Ross (1992) employed a list of 30 community facilities and services to investigate the links between impacts on community facilities, global judgements of tourism's impacts on a community and general satisfaction with community '*modus-vivendi*'. One great concern to emerge involved judgements about changes in the friendliness of local residents. An association was found between lower levels of community

enjoyment and a lessening of the friendliness among residents as a consequence of tourism development, mainly those residents who perceive negative impacts of tourism upon themselves. Therefore and to quote Ross (1992, p.17): 'If a growing number of local residents come to believe that tourism has a detrimental effect upon such major components of social life, then visitors to the community may become the targets for dislike or even hostility'. Such a situation, may cause a decline of tourism and remedial actions are required, like more careful planning and community consultation and decision making (Loukissas, 1983; Ross, 1992).

Ap and Crompton (1993) report that residents' reaction to tourism and its consequences, could be placed on a continuum comprised of four strategies: embracement, tolerance, adjustment, and withdrawal. The most extreme negative behaviour was withdrawal, where residents 'removed themselves temporarily' from the community area. Moreover, the research 'offered no examples of resistance through aggressive opposition' and residents and visitors had similar cultural background. Also the findings from this study suggest two directions for future research. As Ap and Crompton (1993, p.50) point out: 'First, there is a need to relate residents' perceptions of impacts to the behavioural strategies they adopt in reaction to those impacts. A body of knowledge related to impacts is emerging, but the range of strategies that occurs in response to different levels of these impacts has not been empirically addressed. It is probable that there are impact thresholds that cause a quantum number of individuals to shift their behavioural reaction from, for example, tolerance to adjustment. Second, to explore the relationship between impacts and behavioural strategies, probably an instrument that measures dimensions of the strategies continuum will be needed'.

King et. al., (1993) investigated the perceptions of the residents of Nadi, Fiji, towards the impacts of tourism. The initial objective of this study was to examine the attitudes of Nadi residents towards tourism. However a high proportion of the sample 'were found to be either employed in or associated with tourism. As a consequence there are limitations in the research methodology. Despite this, there is a very clear and positive view about tourism. Respondents identified specific negative and positive impacts,

that, in their perspective, affected the community. In effect, King et. al., (1993) stress that until now, it was accepted that resident perceptions of such impacts were subjective, inconsistent and influenced by some factors more than others. A good example has been that residents who benefit economically from tourism favour it and that such support is associated with the belief that tourism causes mostly positive impacts. Following this way of thinking, those without a 'pecuniary interest' in tourism would tend 'to regard its impacts in a negative light'. The results of this study also suggests 'That this state of affairs is not always the case and that support for tourism can be associated with a belief that it induces negative as well as positive impacts. Should the results noted above be confirmed in studies of other geographical areas, then these observations may form the foundation of some new hypotheses in the development of a theory of the social impacts of tourism.' (King et. al., 1993, p.663).

Following the same authors (1993) in the past, tourism leaders have denied the negative impacts that the industry can cause upon host communities, fearing that tourism would lose support from residents, employees and politicians. This study, on the other hand, suggests, the industry's 'best friends' are aware of its negative impacts and that support for tourism is not based on an assumption that it provokes only positive impacts upon host communities. As a consequence, there is a challenge, for private and public sectors and leaders world-wide, to admit that tourism can cause negative impacts. To quote King et. al., (1993, p.663): 'Such an admission should allow industry members to work side by side with other concerned citizens to minimise the negative impacts'. There is both a basis and framework for stakeholder tourism.

King and Weaver (1993) investigated the perceptions of the tourism industry to environmental management issues in Fiji. A survey was conducted which shows that there is a huge level of dissatisfaction with current environmental management practices. The same research states an important recognition by the industry operators of the association between the natural environment and tourism. Respondents support an expansion of current park and reserve provision on a 'user pays' basis. On the other hand, the main concern is the structure of land owning. In addition, King and Weaver

(1993) note that whilst community views are relevant in developing countries, tourism industry views are important from a lobbying point of view, since local government structure have weaknesses and local control is limited. In such cases, the surveying of industry attitudes should be incorporated as a part of tourism in the development process, where competing resource uses emerge. Furthermore concerted educational effort would be required to raise the industry awareness, which might help build stronger links, between private tourism operators and other interest groups.

Johnson et. al., (1994) examine perceptions of tourism development in a rural area experiencing an economic transition. They argue that as the Western United States continues to make a transition from an extractive-based economy to one based on tourism and other services, the opportunity to understand residents' perceptions along the change will be more and more relevant. The same study used various attitude indicators over a 6-year period. The residents, at the beginning, had high expectations for tourism development, but support has diminished over time. Furthermore, the data indicates a complex link between the level of economic development, the level of tourism development, and the expected perceived impacts by residents, as a consequence of tourism. It is further suggested that there is also a complex relationship between the resident sentiments to tourism and the economic and cultural history of the region.

Madrigal (1994) argues that future land-use and the competition for it are the political and economic essence of any area. Each area or locality with a number of smaller communities react to public policy decisions concerning land use, with each group having a particular point of view of land development. The same author (1994) on the basis of resident perceptions, states three clusters of residents (realists, haters and lovers) from two cities located in two different countries. Furthermore, attitudes towards local government's role are compared. As hypothesised, differences among nested communities are greater than differences between cities. On the other hand Madrigal (1994) highlights, that rather than trying to persuade residents that tourism is good for them, local officials, should instead, try to address the needs of the 'various constituencies' in their community, with consequences for marketing and

segmentation of residents, on the basis of their perceptions of tourism development. In addition (Madrigal, 1994) indicates that local officials should support a participatory planning process that involves residents.

Getz (1994) despite noting that not all theoretical issues can be taken into account in the Spey Valley case study outlines several research questions arising from the theoretical review. The research questions addressed are as follows (Getz, 1994, p.249):

- ‘1. Have there been changes in attitudes over a long period of time, and if so, what explains them?;
2. Do results in this case study support social exchange theory for explaining resident attitudes towards tourism?;
3. What are the theoretical implications of perception and attitude measurement for a better understanding of the long-term impacts of tourism? In addition, very practical implications for tourism planning and policy in the case study area are evaluated.’

Meanwhile, Getz (1994) adverts that case study results cannot be generalised for wider application because Spey Valley is a rural area with few development opportunities and as a consequence residents are aware of their dependence on tourism. However, this study does contribute to the understanding of tourism impact causation and resultant resident attitude formation. To quote Getz (1994, p.257): ‘Specifically, the Spey Valley case study lends support to the social exchange theory of attitude formation. Although this research did not test specifically for a relationship between economic dependence and attitudes towards tourism, the 1978 samples clearly revealed that owners and managers of businesses were the most positive about tourism, growth and change. Accordingly, the overall positive attitude towards tourism and growth reflects the belief that the industry’s benefits outweigh the costs to residents’. In addition, if benefits do decline and costs increase, there is awareness of a lack of economic alternatives, which could result in both ‘lowered satisfaction’ and ‘continued support for tourism’. On the other hand these findings

also have implications for the destination life cycle theory and the problem of capacity (Getz, 1994).

Pizam et. al., (1994) compare the perceptions of tourism industry employees and their families in a developing country with their equivalents in a developed country. The localities selected were Nadi, Fiji and Central Florida, USA, as platforms for a cross-cultural comparisons Pizam et. al., (1994, p.60) put it: 'Despite the physical, cultural and economic dissimilarity between the two communities their attitudes towards the industry and their perceptions of tourism's impacts were remarkably similar'. In effect, both groups were found as highly supportive of their tourism in a broad point of view, though Fiji expressed bigger support than Central Floridians. In addition, the impact of tourism and its consequences, was perceived as positive from an economic approach by both groups, but as negative in its impact on legal and environmental areas. The socio-cultural impacts and consequences of tourism were perceived as being mixed. Furthermore, respondents from Fiji perceived the economic benefits as being more positive than 'their Central Florida counterparts' (Pizam et. al., 1994, p.53). On the other hand, further comparative research is suggested, in order to achieve a better knowledge, between perceived impacts of tourism employees and families, in different communities.

Kavallinis and Pizam (1994) investigate the perceptions of residents, entrepreneurs and tourists toward the negative environmental impacts of tourism on the Greek island of Mykonos. It was hypothesised that each of the three groups would view the other two more responsible for the negative environmental impacts provoked by tourism. However, the results only partially supported this hypothesis. The same authors (1994) argue that perceptual gaps were found between tourists and the other two groups. Tourists contend that residents and entrepreneurs as being more responsible than themselves for the negative environmental impacts of tourism. No gaps were found between residents' and entrepreneurs' responses. Moreover, both entrepreneurs and residents perceive the environmental impacts to be lower than tourists did. The most relevant finding was that all three groups - including the residents themselves - considered the residents as being more responsible for the creation of the negative

environmental impacts caused by tourism. To quote Kavallinis and Pizam (1994, p. 32): 'Contrary to this study, residents accepted a significant degree of responsibility for the creation of negative impacts and considered themselves to be more responsible than the other two groups. It seems that the residents recognise that the fate of their community is in their hands and that it would be futile to blame others.' Finally the results of this study emphasised a need for systematic planning at all levels and more research on the issues at stake.

Pearce (1994) notes that the amount of research regarding tourist - resident impacts is impressive and it would not be difficult to cite over 200 articles dealing with this area. In the same study he concentrates specifically on tourist - resident interaction with a focus on the impacts of this interaction on the residents. According to the same author (1994) from the point of view of assessing community feeling, real and perceived impacts are both relevant. As Pearce (1994, p.104) points out: 'If residents believe an impact exists, then their behaviour will be altered irrespective of the accuracy of the perception. Nevertheless it is valuable to comment on whether impacts are objectively verifiable or subjectively felt, since the tactics for preventing and dealing with social impacts may be changed by processes of education, and community information whereas this is less of an option for objectively verifiable impacts (such as restricted access to a recreation site)'.

Ap et. al., (1994) stress the complexity of determining the nature and importance of tourism impacts, emphasising the little theoretical framework as to why residents respond to tourism impacts positively or negatively. Moreover, they note that research on residents' perceptions toward the impacts of tourism has started to focus attention on identifying explanatory variables and developing a theoretical perspective. Furthermore, they contend, a number of theories have been suggested such as social exchange theory, attribution theory and dependency theory. In addition, they emphasise the pertinence of involvement ('perceived importance or personal relevance of an object or event') as an explanatory variable providing valuable understanding as to why positive or negative impacts of tourism are perceived by residents. The same authors (1994) highlight involvement as being a relevant

construct because of its effect on people's attitudes, also providing the conceptual basis towards the perception of tourism impacts. As Ap et. al., (1994, p.1) observe: 'The concept of involvement suggests that host residents who have high involvement with tourism are likely to perceive it positively. Whereas residents who have less involvement are likely to perceive it negatively because tourism has little personal relevance to them.' The hypothesis postulated was confirmed, showing involvement as an adequate concept to apply in the host tourism context. To quote Ap et. al., (1994, p.4): 'The results also indicated that involvement was the most important and relevant factor in explaining residents' perceptions of tourism impacts. Furthermore an important contribution of this study to our knowledge of the involvement concept is that it can also be applied in the product supplier context. Previous studies had examined involvement only from a consumer perspective.

Ryan and Montgomery (1994) identify and categorise the attitudes of residents towards tourists and indicate the stability of those attitudes over a certain period of time. The case study was the town of Bakewell in the Peak National Park within the United Kingdom. The authors consider (1994) that a major reason for carrying out the study was to assess the degree to which residents were homogenous in their attitude to tourism. In effect, three groups emerged:

- the enthusiast;
- the somewhat irritated;
- the middle of the roaders.

The same authors argue (1994, p.365): 'The results were analysed to assess whether the clusters were characterised by some specific socio-economic variables or other factors such as level of education. No such determining variables were identified. The attitudes were independent of such factors.' For the same authors in the case of Bakewell, other factors, such as employment in tourism, work in Bakewell or nearby, did not appear to be determining attitudes to tourists. Furthermore, an analysis of cluster membership presented few significant differences between clusters, regarding socio-economic variables. In addition, it is suggested that future research should take

into account general attitudes before seeking to elicit attitudes to specific components' of planning and bring about a concept of stakeholder tourism involving public bodies, private sector and community groups, in the spirit of community-responsive tourism.

Lankford and Howard (1994) in their study of residents of the Columbia River Gorge, also stressed that many variables thought to have relevant impact on resident attitudes towards tourism, were found 'to have negligible influence' within the framework of a regression model. This was to some extent, similar with the Bakewell findings (Ryan and Montgomery 1994). In the case of Lankford and Howard (1994) a multiple item tourism impact attitude scale (TIAS) was used in response to the importance of the standardised measurement of resident attitudes towards tourism development. Using the TIAS, a multiple regression model was applied to test the effects of these independent variables on resident attitudes. Several of the independent variables identified from the literature and tested in the research of Lankford and Howard (1994) are outlined as follows:

- length of residence;
- economic dependency on tourism;
- distance of tourism centre from respondents' home;
- resident involvement in tourism decision making;
- birthplace;
- level of knowledge;
- level of contact with tourists;
- demographic characteristics;
- perceived impacts on local outdoor recreation opportunities;
- rate of community growth.

The same authors consider this study as making several criticisms to the Irridex Model. These models ignore the complexity of factors that can influence, positively or negatively resident attitudes. To quote Lankford and Howard (1994, p.135): 'Even in the lightly populated rural areas of Columbia River Gorge, resident attitudes toward

tourism are not homogenous. Local responses were found to be diversified, driven largely by perceptions of how tourism personally impacted their lives and their community. Those who felt economically dependent on it held a generally benign view of tourism and its impacts, while those who felt they had to compete with tourists for access to local recreation resources expressed generally antagonistic views. These findings lend credence to previous findings that indicate that those who receive direct benefits from tourism are less likely to attribute negative social and environmental consequences to it and hold more positive attitudes towards its expanded development.' On the other hand, Lankford and Howard (1994) conclude that city administrators, city planners, and regional/state tourism authorities that attempt to develop and promote tourism could benefit from this research. In addition, they suggest great efforts should be made to identify ways to involve residents in their community policy.

Brawn and Giles (1994) discuss the modifications to their daily lifestyle made by residents in response to the social impacts of tourism. In this study the result of an exploratory research are presented, based on the assumption that residents develop ways of coping during peak periods of tourism activity. As Brown and Giles (1994, p.759) observe: 'Coping strategies would entail temporary changes in behaviour, when residents do things differently to how they would be done in normal, non-peak periods.' Ap and Crompton (1993) have stressed the need for an instrument to measure 'dimensions of the (residents') strategies continuum'. This point of view is supported by Brown and Giles (1994). As a consequence it should be possible to measure the extent and nature of coping strategies in different communities and 'to determine the role of factors which may influence any differences. Thresholds of behaviour, such as the point at which people may choose to retreat after having reorganised their activities, could be examined. Relationships could be illustrated by showing the level of resident response in proportion to the degree of tourism impact'. (Brown and Giles, 1994, p.763). Furthermore, and according to the same authors (1994), the figures show that the social impact of tourism may be related to the extent to which residents' territory is perceived as being invaded. However, according to the

findings, it may be determined by the extent to which the residents reorganise their activities, minimising the points of interaction.

The same study has also shown that there is a need for further understanding of tourism impacts ‘ by examining the significance of variables such as the number and type of tourists residents interact, the duration of the impact, the location where the impact occurs and the contextual framework of the interaction in terms of the personal history of residents. It would seem that despite an extensive literature devoted to the social impact of tourism, this remains a subject with many unanswered questions’ (Brown and Giles, 1994, p.763).

Harvey et. al., (1995) surveyed rural Idaho residents to ascertain their perceptions and attitudes about tourism. The towns chosen represented three levels of tourism dependence: high, moderate and low. The study examines the perceptions that women and men have, as regarding tourism development. The research question was: ‘What differences, if any, exist among men and women in their perceptions of tourism development in the state as well as in their local area?’ (Harvey et. al., 1995, p.350). In addition, ‘the hypotheses for this study were, that women and men would have different perceptions about tourism development in Idaho and in their communities; and that women and men would have different perceptions of tourism development depending on their community’s level of economic dependence on tourism’ (Harvey et. al., 1995, p.352). According to the same authors (1995) past research on differences in perceptions of tourism development, as a consequence of gender, has presented mixed results. In the present study, however, no significant differences, based on gender, were found. On the other hand, residents’ perceptions of tourism development in their communities presented significant differences between the three levels of tourism dependence. As Harvey et. al., (1995, p.362) observe: ‘These differences helped validate that the similarities due together are real and not an artefact of the rating scale. Although residents’ perceptions of tourism development differ significantly among communities with high, moderate, and low levels of tourism dependence, there is much similarity in the way men and women perceive tourism in each of these communities’. Women and men were hypothesised to have

different perceptions about tourism development in Idaho and in their communities, and to have different perceptions of tourism development as a consequence of their community's level of dependence on tourism. As the same authors, (1995, pp. 362-363) observe: 'The results of this exploratory research suggest that although some small differences may be found among men and women in their perceptions of tourism development, for the most part, men and women share similar perceptions of tourism in Idaho and in their communities. Male and female respondents did differ in their perceptions of the impacts of tourism development on local recreational opportunities. Women felt that tourism had negatively impacted recreational opportunities for local residents in their area, yet they also felt tourism had increased Idaho's overall number of recreational opportunities. Women were also more likely to perceive that their community could support itself without tourism, and they felt more negative than men about allowing non-residents to develop tourism attractions in Idaho.' Finally the same authors (1995) conclude that understanding how tourism is perceived by all residents has consequences for both planners and leaders.

Lankford et. al., (1995) examines the attitudinal and socio demographic differences in 'three waves ' (multiple mailings) and a check of non responsive bias. The study upon Columbia River George National Scenic Act deals with the concept of regional development, stresses the importance of the area for measuring attitudes towards tourism development, and suggests that no differences exist in the waves, yet some differences exist between respondents and non respondents.

Burns (1996) examines community concerns regarding the growth of tourism in the Solomon Islands and aims to determine the type of development considered by residents as being economically socio-culturally and environmentally appropriate. The main survey instrument was a questionnaire based on a 1989 attitudinal survey of Tuvalu. As Burns (1996, p.938) points out: 'The sample surveyed gave a clear indication that the preferred form of development was one that was locally controllable. That is, the residents wanted to establish tourism ventures with high levels of local involvement which would provide the opportunity for self-

determination in matters aimed at ensuring the maximisation of total benefits from the operation of a tourism industry’.

Din (1996) contends that ‘equitable involvement’ of the host community is a prerequisite to sustainable tourism development. Akis et. al., (1996) stress, that already in 1980, Butler postulated a relationship between tourism development and the attitudes of residents to tourists. Moreover, Hernandez et. al., (1996, p.755) argue that ‘residents’ attitudes towards tourism development is an area of increasing interest to tourism industry managers, public policymakers, and academicians. Managers are concerned with offering a tourism site where residents treat tourism well. Public policymakers are concerned both with the economic viability of tourism in their region and with the costs and benefits of tourism to its host society. Academicians in various disciplines are concerned with the above issues as well as offering frameworks for understanding residents’ attitudes’. This study conducted in Isabela, Puerto Rico, aims to assess the attitudes of residents towards a proposed resort, Costa Isabela. Moreover, Hernandez et. al., (1996) argue that none of the previous models explicitly includes both a pre-tourism phase and an ‘instant resort’ scenario. The same authors (1996) conclude that whatever frameworks are employed to help understanding residents’ attitudes to tourists, these attitudes are likely to be ambivalent in the pre-resort phase. Furthermore, as Hernandez et. al., (1996, p.776) say: ‘More research should be done on the pre-development stage and, where possible, longitudinal research can offer great insights into changing attitudes of residents towards tourism’.

Schroeder (1996) highlights the importance of the tourism image that local residents have of the destination area. He argues that the image that residents have of their destination would be important for two reasons:

1. Influencing political support to promote and develop tourism; and
2. It may influence the image of potential visitors via messages given by residents to friends, relatives, and business associates. As a consequence, the study seems to support a need for programme aiming at making residents more

aware of the positive features of their regions. It also suggests that 'improving the residents' image might keep resident tourists in their home areas' (Schroeder, 1996, p.73).

Haralambopoulos and Pizam (1996) investigate the impact of tourism, as perceived by residents of Pythagoriaon, on the Greek island of Samos. The finding from the study discovered that respondents had a mixed attitude to tourism. To quote Haralambopoulos and Pizam (1996, p.522): 'On the one hand, the findings suggest that there was a high degree of agreement among respondents with regards to the positive economic impacts of tourism on the area. Such impacts included employment, town's overall tax revenue and personal income. In addition, it was found that the majority of respondents had very positive perceptions of the impacts of tourism on certain issues related to the role of women and young adults in the community's social and economic life.' On the other hand, even with a favourable disposition to tourism, respondents recognised some negative social impacts, such as crime, brawls, vandalism, sexual harassment, and drugs. Moreover, respondents felt that tourism had no impact on morality, honesty, confidence among people, organised crime, prostitution and gambling. However, they felt that hospitality to strangers improved as a consequence of tourism. Respondents also believed that tourism had a positive role on the image of the destination and the majority supported the expansion of tourism. As Haralambopoulos and Pizam (1996, p.522) noted: 'From this, one can safely conclude that awareness of tourism's social costs does not necessarily lead to opposition towards further development of the industry'. In addition the same authors (1996) conclude that there is a strong relationship between respondents' socio-economic characteristics and their perceptions on the impacts and consequences of tourism in two ways:

1. Direct dependency on tourism is the most important factor of residents' attitudes towards tourism;
2. Socio demographic characteristics play an important role 'in understanding significant perceptual differences between groups of respondents'. The most relevant were occupational status, years of residence, number of minors in the

family, size of household, education, income and employment of one or more family members in tourism;

3. The social impacts of tourism are not universal.

To quote Haralambopoulos and Pizam (1996, p. 523): 'Clearly, the intensity and direction of the impact depend on a variety of sociocultural and economic factors related to local areas and destination communities. Further, it is closely associated with the nature of tourism activities, the personal characteristics of tourists and the rapidity and intensity of tourism development. However, only through the accumulation of knowledge that results from the conduct of such comparative studies in various regions of the world can one better understand tourism's social impacts'.

Baum (1996) contends that the relationship between tourism, tourists and host community has become of great interest for both academic and consulting activities, and gives examples of the role of community involvement and ownership at all stages of tourism development. The same author advocates educational programmes in schools and in the community to prepare the residents for being aware of their role in the presentation of the destination to tourists.

Jurowski et. al., (1997) study resident reactions to tourism in the frame of a theoretical paradigm based on the principles of social exchange theory. Moreover, they present a model which explains how residents assess several factors that influence their support for tourism. As Jurowski et. al., (1997, p. 3) observe: 'The analysis demonstrates that potential for economic gain, use of the tourism resources, ecocentric attitudes, and attachment to the community affect resident perceptions of the impacts and modify, both directly and indirectly, resident support for tourism.' The same authors (1997) outline the implications of this exploratory work. They are:

1. The relevance of analysing factors that influence the perception of tourism impacts;
2. The importance of environmental attitudes and community attachment in facilitating attitudes to tourism;

3. Being aware of the need for internal marketing to the community;
4. The establishment of a theoretical framework for examining resident attitudes to tourism.

Lawson et. al., (1998) investigated the residents' perceptions of tourism impacts at 10 towns in New Zealand with different roles and levels of development and involvement with the tourism industry. To quote Lawson et. al., (1998, p. 247): 'The locations were chosen to reflect as wide a variation as possible in the different community level factors that influence the social impacts of tourism, for example dependence on tourism and seasonally. By comparing the similarities and differences between the towns it is possible to suggest some important consequences for the management of tourism destinations'. The same authors (1998) state that the assessment of social impacts may be studied in a number of perspectives but since the 1970s the most usual one of 'empirically assessing the social impact of tourism has been through the measurement of residents' attitudes towards the industry and the effects that were perceived in their local communities' (Lawson et. al., 1998, p. 247). Moreover, they stress the attitudes to tourism held by residents vary according to individual and community or societal factors. At the latter level the following factors are summarised:

- guest /host ratio;
- perceived cultural or psychic distance;
- economic dependence on tourism;
- host's control over decision-making;
- stage of life cycle;
- degree of seasonally;
- type of tourism encountered within the community.

The same authors highlight that many of these factors are related to the notion of the destination life cycle. In effect 'it is hypothesised that the type of tourist changes over the life cycle of the destination as well as the volume' (Lawson et. al., 1998, p.248). On the other hand the same authors conclude:

1. Tourism is a good thing for New Zealand mainly as far as the economy and employment are concerned;
2. Paradoxically residents are 'less inclined' to accept that tourism has been positive to them;
3. Residents like the contribution of foreign investment but want the profits retained in New Zealand;
4. Planners and businesses responsible for the development of tourism should involve local residents in consultation;
5. Planners and businesses should manage the more critical aspects when tourism destinations achieve maturity.

Godfrey (1998) conducted a survey of local government tourism officers in the UK, examining the attitudes of public sector 'tourism managers' to the principles of 'sustainable tourism'. The same author concluded that sustainable guidelines suggest tourism should be planned and managed on a more regional level, integrating local and regional issues. Furthermore, for structural changes Godfrey (1998) suggests that tourism planning and management should be inclusive, strategic and integrated.

Ryan et. al., (1998) compare responses to the same questionnaire by residents in two rural areas, one in New Zealand and the other in the UK. The study areas are in different stages of the destination life cycle. Following Ryan et. al., (1998) the research confirmed that socio demographic variables have 'weak discriminatory power'. As a consequence, the same authors (1998) contend that attitudes towards tourism impacts are 'filtered through a value system', but at the beginning respondents do not use 'core values'. However, as tourism develops, then the application of an individual's core values means that a clearer demarcation of views can be discerned in more mature tourist destinations. This appears to be the case in the two areas studied in this research '(Ryan et. al., 1998, p. 116). Therefore the stage of destination development seems to be an important determinant in resident attitudes, which are filtered through value systems and the value systems depends upon whether those values are of peripheral or core importance to the personality of respondents

(Ryan et. al., 1998). Other conclusions from the same study can be summarised as follows:

1. It is possible to use the same questionnaire upon different rural communities and other areas;
2. From this research Doxey's point of views are confirmed. Residents of more mature destinations express more reservations about tourism and its development;
3. This research confirms no clear links between socio demographic variables and support or opposition to tourism;
4. This research, based on Rangitikey, supports, to some extent, that even when 'tourism development is embryonic' and support for it is strong, relevant sectors of the population are sure that there is a need to monitor and plan tourism ;
5. Demarcations and opinions, as suggested by reference to core values, are more acute in mature tourism destinations. However, this study 'leaves this proposition untested, but does highlight a possible direction for future research'. (Ryan et. al., 1998, p.128).

Smith and Krannich (1998) contend that many rural communities view tourism as a major trigger for addressing economic decline, but the growth of tourism can cause negative social impacts. This study examines 'The degree to which rural community residents perceive negative impacts from increased levels of tourism development. Specifically, the paper evaluates a hypothesis suggested in recent impact research-called here the 'tourism dependence' hypothesis- which posits a direct relationship between the level of tourism development experienced in a community and the presence of negative resident attitudes towards tourism'. (Smith and Krannich, 1998, p.786). The results support the hypothesis with some important qualifications and suggest a typology of communities with different experiences of tourism growth that includes tourism-saturated; tourism-realised and tourism-hungry types. However, among other limitations this study only examines resident attitudes about tourism development, economic development, population-growth, community satisfaction and

crime concern, with controls for a number of socio demographic variables. As a consequence, Smith and Krannich (1998) contend that a number of other factors can influence attitudes that are not taken into account in the analysis. Therefore, 'the tourism-dependency typology is offered as a hypothesis for future evaluation' (Smith and Krannich, 1998, p.800). To assess the validity of this hypothesis the same authors (1998) suggest:

1. The study of further measures and variables;
2. A larger and random sample of communities with diverse grades of dependence from tourism;
3. Longitudinal research designs;
4. Assessment of individual respondents' dependence on tourism, for better discriminating both community and individual tourism dependence.

4.3 Useful Definitions of Attitudes

Oppenheim (1996) states that the study of attitudes had not had an easy history in social psychology and for the purpose of verbal measurement, there is a consensus among researchers that an attitude is a state of readiness, a tendency to respond in a particular way when confronted with a certain stimuli. Moreover, the same author notes that attitudes are usually dormant and manifested in speech or behaviour only when 'the object of the attitude is perceived.' Furthermore attitudes are reinforced by beliefs (the cognitive component) and feelings (the emotional component) which may cause particular behavioural intents (the action component). On the other hand and quoting Oppenheim (1996, p.176): 'Some attitudes seem to be more embracing than others; they lie at the base of more limited or specific attitudes and beliefs, thus predisposing individuals in a certain way toward new attitudes and experiences that may come their way. For ease of understanding, social psychologists make a rough distinction between these different levels, calling the most superficial one 'opinions', the next one 'attitudes', a deeper level 'values' or 'basic attitudes', and a still deeper level, personality.' Also attitudes do not exist in isolation. They have links with parts of other attitudes and with value systems of a person. Finally, Oppenheim advocates

(1996) that attitudes are also related horizontally and important research has been dealing with such interrelationships.

Clark et. al., (1998) emphasised there is room, in tourism and hospitality for attitudes playing a relevant role in the decision making process, and there are strong reasons to have positive and negative feeling in this area. Moreover, since tourism is a dynamic activity there is place for conflicting attitudes and change.

Riley (1996, p.75) defines attitudes as 'A predisposed response to situations, objects, people, other self defined areas of life. It has both a perceptual and affective component. The latter produces a direction in the attitude - positive or negative. This, in turn can influence the perceptual element - we see what we want to see!' Clark et. al., (1998) stress as key characteristics of attitudes:

1. Focus and fixidity;
2. Related to feelings;
3. Attitudes 'live' in groups.

Moreover, attitudes having fixity are associated to anchors and reinforcers and attitudes are anchored to values, to culture, habitual behaviour and to approved behaviour (Clark et. al., 1998). The same authors (1998, p.119) state the character of attitudes as follows :

- 'They are related to an object, a person, an idea, a piece of behaviour within the individual's environment;
- They influence perception by influencing the way the individual collects information. In turn this relationship becomes reciprocal. They influence the formation of goals;
- They are learnt and enduring; and
- They imply both evaluation and feeling.'

The same authors (1998) contend that if intention to behave is put between attitudes and behaviour right measurement can produce some predictions. Furthermore, the task of attitude measurement is 'to find the attitude under investigation through the manipulation of assumed known associates and assumed larger constructs' (Clark et. al., p.122).

4.4 Attitude Change

If it is assumed that attitudes and behaviour are linked, the process of changing attitudes should be an important tool for decision-making in general terms and as far as tourism and residents are concerned. According to Rice (1993) after discussing the cognitive, affective and conative components of attitudes a framework for achieving change strategies would be useful. In effect, he suggests attitude change via cognitions focusing the attributes of the product; attitude to change via effects, increasing liking or disliking; attitude change via behaviour. Rice (1993) also outlines 6 factors affecting attitude change and influencing the ease or difficulty of changing attitudes. They are:

1. Existing attitudes;
2. Source factors;
3. Message features;
4. Channel of communication;
5. Receiver attributes;
6. Product characteristics.

Figure 4.1 presents a detailed communication system of attitude change useful for decision makers and tourism policy.

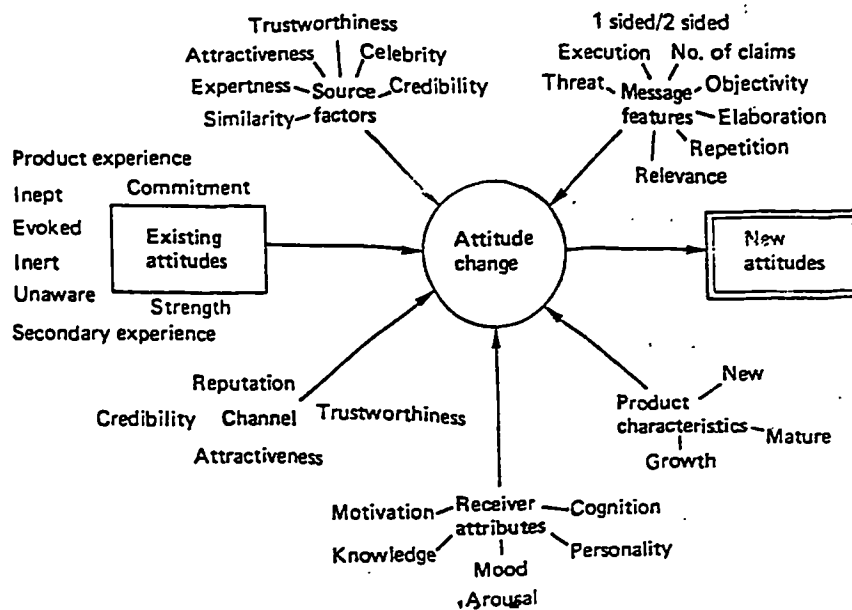


Figure 4.1 Communication System of Attitude Change

Source: Rice, C., 1993, p. 201

4.5 Tourism Community Relationships

Following Pearce et. al., (1996) ethnographic case studies of tourism impacts have been a big tradition in developing countries mainly in the South Pacific, The Caribbean and Asia. According to the same author (1996) in this literature on tourism impacts and community responses to tourism, stage or step models were and still are dominant (Smith 1978; Doxey 1975; Butler 1980). The critics and observations of Pearce et. al., (1996) towards stage-based models can be summarised as follows:

1. There is poor demarcation in stages or steps;
2. It is not clear whether changing from one stage or step 'precludes the continued existence of the previous stage';
3. Stage models raise the question of whether or not the order of the phases is invariant.

The Doxey (1975) and Smith (1978) models support this point of view, but Butler (1980) emphasises that some resorts, namely Cancun, may move 'directly into a higher level stage' without the 'preceding steps';

5. According to Pearce et. al, (1996) the theory of social representations is a candidate for a role on the tourism-community area, with its approach of an interacting, communicating and dynamic community.

4.6 Social Representation

To quote Moscovici (1984, p.49):

‘Here is a concrete example: unemployment at the moment is widespread and each of us has at least one unemployed man or woman among his personal acquaintances. Why doesn’t this man or woman have a job? The answer to this question will vary according to the speaker. For some, the unemployed just don’t bother to find a job, are too choosy or, at best, unlucky. For others they are the victims of an economic recession, or unjustified redundancies or, more commonly, of the inherent injustice of a capitalist economy. Thus the former ascribe the cause of unemployment to the individual, to his social attitude, while the latter ascribe it to the economic and political situation, to his social status, to an environment that makes such a situation inevitable. The two explanations are utterly opposed to each other and obviously stem from distinct social representations. The first representation stresses the individual’s responsibility and personal energy - social problems can only be solved by each individual. The second representation stresses social responsibility, denounces social injustice and advocates collective solutions for individual problems.’

In this quote Moscovici (1984) gives an example of social representation from common experience. Social representations can be considered as ‘a set of concepts, statements and explanations originating in daily life in the course of inter-individual communications’(Moscovici, 1981, p.181). Social representations are similar, in our society, of the myths and beliefs in traditional communities and they are the present version of common sense (Moscovici, 1981). According to Pearce et. al., (1996) the theory of social representation can be very useful to research of tourism and host communities namely what is the point of view of communities about tourism, what

are their expectations about it and how do the communities answer to tourism (Pearce et. al., 1996). Following Pearce et. al., (1996), Moscovici considers cognitive systems with a logic and language specific, with implications for values and concepts. They are not simply signals, 'opinions about', 'images of', or 'attitudes towards', but 'theories' or 'branches of knowledge' in the organisation of the reality, with the objective of building an order and enabling communication among the members of a community providing a code for social exchange and for naming and classifying the 'world'. On the other hand, Moscovici (1984) considers anchoring and objectifying as the two processes that generate social representations. To quote Moscovici (1984, p.29): 'The first mechanism strives to anchor strange ideas, to reduce them to ordinary categories and images, to set them in a familiar context. The purpose of the second mechanism is to objectify them, that is to turn something abstract into something almost concrete, to transfer what is in the mind to something existing in the physical world'. Furthermore, social representations can be considered as semiotic systems, giving meaning for symbols and the association between a signifier and what is signified, taking also into account the use of images as a simplification process (Pearce et. al., 1996). In addition, Pearce et. al., (1996) state that social representation theory orients the researcher to look for more than a measure of an individual's position on an attitude scale; asks questions relating to values, origin of knowledge and beliefs on which the attitudes are based. Table 4.2 provides a summary of the key features of social representation theory.

-
1. Social representations are complex meta-systems of everyday knowledge and include values, beliefs, attitudes, and explanations.
 2. The content and structure of social representations are important.
 3. Social representations help to define and organize reality.
 4. Social representations allow for communication and interaction.
 5. Social representations make the unfamiliar familiar.
 6. Through the use of metaphors, analogies and comparisons with prototypes, social representations fit new and abstract concepts/events into existing frameworks.
 7. Images are central components of social representations.
 8. Abstract concepts are both simplified (through the use of images and analogies) and elaborated (through connections to existing knowledge).
 9. Social representations have an independent existence once created and so can be found in social or cultural artefacts.
 10. Social representations are critical components of group and individual identity.
 11. Social representations are important features of group interaction and so social representations theory explicitly recognizes social conflict and the importance of power in social dynamics.
 12. Social representations are prescriptive. They can direct both action and thought (especially perception).
 13. Social representations are not deterministic or static. They vary along many dimensions including the level of consensus about them, their level of detail and how they are communicated. Individuals can and do influence, create and change social representations. They can be changed through individual influence, direct experience, persuasive communication, and/or group interaction.
 14. Social representations connect individuals to their social/cultural worlds.
 15. Social representations are both influenced by and influence science.
-

Table 4.2 Key Features of Social Representations Theory

Source: Pearce et. al., 1996, p.56

4.7 Social Representations and the Tourism-Community Relationship

As written before a social representations' approach is a main organising perspective which helps to describe and interpret how groups of people understand and react to reality. The study of tourism and host community reactions to it seem adequate to the social representation framework. As Pearce et. al., (1996, p.60) point out: 'The social representations framework is an organising theory. It directs attention to whole systems of benefits, values, attitudes and explanations which individuals and groups hold about tourism. It is a theory which operates specifically on a community level'. Moreover, the emic approach (taking into account the residents responses) exploring the range of attitudes and breadth of the residents' opinions and in addition directing the focus to the importance of certain impacts in constructing the attitudes to tourism, reveals being a tool of paramount relevance (Pearce et. al., 1996). Following the same

authors (1996) they note that the overall attitude to tourism has been built from perceptions of its impacts. Also they contend this is the assumption of Doxey's Irridex and Butler's life cycle model. However, Pearce et. al., (1996) suggest a new perspective. As they (1996, p.60) put it: 'Some researchers have carried this to the point of actually summing perceptions of impacts to create a score to indicate a total attitude towards tourism. This logic could however be reversed. Perhaps it is the overall image of tourism and tourists and associated beliefs which structure the way that impacts are perceived and felt'. The same authors (1996) emphasised that the former approach assumes that all impacts are of equal significance to the respondents and it looks like, on the other hand, that residents attribute different weights to impacts and moreover, it is also likely that these weightings are not uniform across the residents of a given community. As a consequence, Pearce et. al., (1996, p.62) highlight: 'To understand community responses to tourism it is apparent that we must do more than provide a simple algebraic approach to this complex topic', and one should look for connections or networks of tourism impact items, with other beliefs, attitudes, values and expectations as well as identifying 'a central cluster or core of images which communicates or portrays social representation' (Pearce et. al., 1996, p.78). After reviewing literature dealing with the history of tourism studies (McIntosh 1992; Young 1973; Turner and Ash 1975; Rosenow and Pulsipher 1978; Jafari 1990), Pearce et. al., (1996) indicate as sources of social representations:

1. The print and electronic media;
2. Social interaction (with relevance for opinion leaders);
3. Direct experience (visiting the destination);

Furthermore, they point out (1996) three types of bias of social representation of tourism researchers. They are:

1. Compounding the consequences of tourism with the consequences of other forces, namely: urbanisation, population growth and mass media;
2. The 'noble savage syndrome';
3. Lack of local residents' voice in the literature.

In addition, and to quote Pearce et. al., (1996, pp. 101-102): ‘A further consequence of being aware of the range of tourism’s effects, and the need to research rather than prejudge tourism’s consequences, has led to the development of the quantitative research tradition in impact studies (c.f. Pizam,1978). This survey-based approach was initially conceived as a thorough alternative to the potentially biased cultural interpretations of more qualitatively minded researchers. While the 1970s had been marked by some leading anthropological accounts of the sociocultural impacts of tourism (e.g., Smith 1978), the next decade of research witnessed the growth of the survey work.

Thirty-one articles from leading tourism journals published between 1978 and 1995 were identified which presented quantitative data from surveys of community responses towards tourism impacts. It is of interest to ask what kinds of tourism impacts receive priority in these 31 articles, and are there any notable trends in this data set of data-based articles that can highlight how researchers are viewing the tourism-community relationship?’ Table 4.4 summarises the types of impacts studied in these articles.

Following Pearce et. al., (1996) two main approaches were used in the surveys to measure resident perceptions towards tourism impacts:

1. One-third of the studies presented to respondents, a list of features of community and personal life and asked them to rate the degree of tourism impact about these items;
2. To show a list of statements regarding tourism and ask respondents to rate their agreement with these statements. The lists usually presented both negative and positive statements about tourism.

Impacts	Neutral Wording	Positive Wording	Negative Wording	Total
1. Socioeconomic				
Employment	8	12	—	20
Facilities for recreation and entertainment	5	10	4	19
Prices/cost of living	4	—	8	12
General economy	2	9	—	11
Standard of living	7	4	—	11
Infrastructure	3	7	—	10
Public services	4	2	4	10
Taxes	4	4	—	8
Investment	—	5	—	5
Income	4	—	—	4
Other industries/economic activities	2	1	—	3
Availability of goods/services	1	—	1	2
Housing conditions	2	—	—	2
Total	46	54	17	117
2. Environmental				
General environment	3	9	5	17
Traffic	7	—	10	17
Pollution/litter	2	—	5	7
Crowding/congestion	—	—	7	7
Character of town	3	3	—	6
Noise	1	—	4	5
Historic sites	—	2	1	3
Total	16	14	32	62
3. Sociocultural				
Crime	6	—	10	16
Quality of life	3	6	7	16
Traditional culture/cultural activities	4	6	4	14
Social interaction	3	2	6	11
Drugs/alcohol	7	—	2	9
Cultural exchange	3	4	1	8
Social justice/equity	1	—	6	7
Morality	4	—	3	7
Prostitution	4	—	2	6
Stereotyping	3	—	—	3
Family life	1	—	1	2
Outside political control	1	—	1	2
People become more commercial	—	—	2	2
Education	1	1	—	2
Language	—	—	1	1
Total	41	19	46	106
Overall total	103	87	95	285

Table 4.3 Summary of Tourism Impacts Listed in Surveys

Source: Pearce et. al., 1996, p.103

Table 4.3 shows both the numbers of different kinds of impacts studied and whether or not they were shown to respondents in a neutral, positive or negative way. Table 4.3 also highlights that socio-economic impacts are most presented to respondents and

are most likely to be shown in a positive way. Sociocultural impacts follow, but are more likely to be presented in a negative mood. The same applies to environmental impacts. Therefore, socio-economic impacts 'are significantly more likely to be presented as positive or neutral, than either environmental or sociocultural impacts. An examination of the individual impact items is consistent with the previously reported patterns. Of the ten most commonly used items, five are socio-economic, two environmental, and three sociocultural' (Pearce et. al., 1996, p.102). Furthermore, and following the same authors (1996), taking into account that only three out of the 30 studies derive their impact items from methods such as focus groups, with the others being generated either by the researcher or from previous research, it can be defended that Table 4.3 shows a 'picture of the social representations of tourism impacts held by researchers'. It looks like that from the point of view of the researchers that tourism is good for the host economy (except prices), bad for the environment (mainly for crowding and traffic), and also bad for crime and quality of life of residents (Pearce et. al., 1996).

Table 4.4 summarises the impacts presented in case studies and ethnographic accounts of tourism impacts.

As Pearce et. al., (1996, pp.102-103) observe: 'Clearly, the transition from the qualitative to more quantitative accounts of tourism has resulted in a more restricted view of tourism impacts. Many proposed sociocultural impacts and negative socio-economic impacts have been given little or no attention in the quantitative work'. Furthermore, it seems that, according to the same authors (1996), the most important conclusion that can be derived, from the literature examined, is the need for researchers in the field of tourism community relationships to know about 'the reality of tourism for host communities'.

1.	Socioeconomic More and more varied employment Unskilled, menial employment Seasonal income and seasonal unemployment Increased unemployment as people migrate for work Increased standard of living Inflation and increased costs Dispersion of development Increased dependency on a single industry Dominance by multinational companies Improved infrastructure/services Increased taxes to build infrastructure Infrastructure/services strained Leakage of income to external sources Displacement
2.	Environmental Crowding and congestion Degradation and damage to the environment in general Traffic problems Pollution/litter Damage to sites of historical and cultural significance Preservation of sites of historical and cultural significance Preservation and restoration of the environment
3.	Sociocultural Changes to family structure and gender roles: often creates new opportunities for women and younger people, but also tension and loss of self-esteem for men and older generations Demonstration effect: copying of tourists and loss of traditional values and activities Support for a revival of traditional culture Support for demonstration of ethnic identity Changes to arts, craft, dress, festivals, etc. as a part of production for tourists Crime Drugs and alcoholism Loss of privacy Changes in morals, values, and attitudes Introduction of commercialism Begging Invasion of traditional/sacred sites Breaking of cultural taboos Recreational conflicts Community conflicts Creation and maintenance of stereotypes Breaking down of stereotypes Increased social inequity Loss of language Support for language Increased recreational opportunities External political control Better education Loss of artifacts Cultural exchange Introduction of disease Prostitution Loss of access to various places Interference with/disruption to traditional practices

Table 4.4 Summary of Tourism Impacts from Case Studies, Ethnographics and Reviews

Source: Pearce et. al., 1996, p.104

On the other hand, being a social representation approach an emic, contextual, processual theory, in order to attain this objective, they suggest (1996) eight core ideas or points to pursue:

1. A focus on the types of tourism, tourists and communities;
2. An emphasis on the content of responses;
3. The structure and organisation of responses;
4. The commonality of opinions within the community;
5. The role of familiarity and unfamiliarity 'need to deal with the unfamiliar and manage change'
6. The processes which shape social representations 'processes of anchoring and objectivation', 'metaphors' and 'images';
7. The sources of our information about tourism;
8. Social representations may define community groups.

To quote Pearce et. al., (1996 p.107): 'One of the confusing questions about community reactions to tourism has long been who holds what opinions. An important possibility inherent in the social representation approach is to define the commonality of opinions first and then explore the psycho demographics of the groups holding these opinions. Currently, much work proceeds with limited and a priori socio demographic segmentation. The possibility of providing a much more integrated and emic view of how communities react to tourism is an attractive feature of the social representations approach'.

4.7.1 Other Insights into Models for Resident Attitudes to Tourism

Lindberg and Johnson (1997) note that numerous studies have been conducted to identify resident attitudes toward tourism. They extend the subject by suggesting 'a broad synthetic conceptual model of attitudes'. Using data from a survey, they present two specific models derived from the general one shown in Figure 4.2.

The specific models are value-attitude (VA) models that focus on inter attitudinal structure and that indirectly evaluate outcomes affecting attitudes. The other specific model includes expectancy-value (EV) models that focus on intra-attitudinal structure and directly assess outcomes affecting attitudes. The models are similar and both static. Figure 4.2 presents several values that might be associated with attitudes towards tourism. Lindberg and Johnson (1997) define attitude, value and goals or

outcomes. Attitude is a psychological tendency expressed by evaluating a particular entity with some level of favour or disfavour. Value is an enduring belief that a certain mode of behaviour or end state of existence is personally or socially preferable to an opposite one (mode of behaviour or end state of existence). These modes of behaviour and end states of existence are quite often called goals and outcomes. Value is considered an abstract attitude (Lindberg and Johnson, 1997).

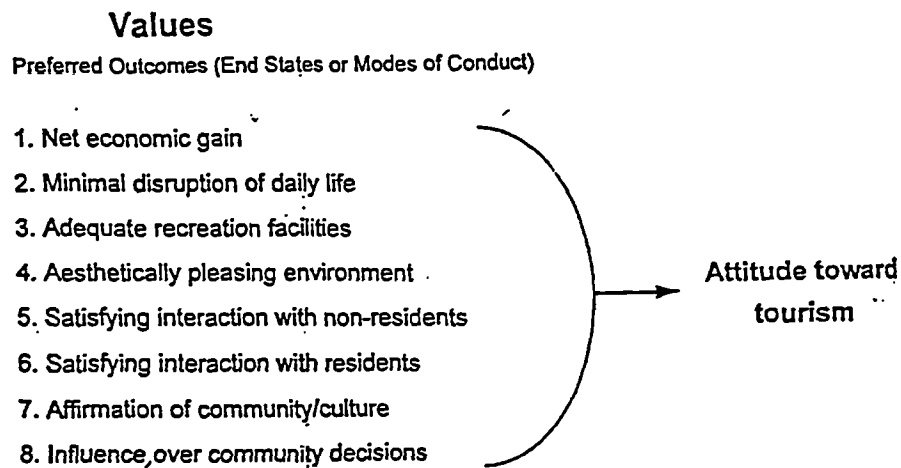


Figure 4.2 The Relationship between Values and Attitude Toward Tourism

Source: Lindberg and Johnson, 1997, p.404

'EV Model is based on the principle that attitudes are a function of the belief that an attitude object is associated with a set of outcomes and the evaluation of the set of outcomes (the level of preference for those outcomes). To predict attitudes, beliefs are typically multiplied by evaluations with these cross-products summed across outcomes' (Lindberg and Johnson, 1997, p.407).

$$\text{Attitude} = \sum b_i e_i$$

Where b is belief, e is evaluation, and there are I = 1 to n salient outcomes. To quote, Linberg and Johnson (1997, p.407): 'If a resident perceives that tourism generates a net economic gain and he/she evaluates this outcome positively, he will tend to have a positive attitude toward tourism. Conversely, if a resident perceives that tourism generates disruption in her daily life and she evaluates this outcome negatively, she will tend to have a negative attitude toward tourism. The combination of belief-

evaluation cross-products for salient outcomes is hypothesized to predict the resident's attitude toward tourism'. The same authors emphasise that EV models, such as Theory of Reasoned Action and its successor the Theory of Planned Behaviour have been useful to predict a huge variety of attitudes and behaviours. Moreover, there is an overlap between EV models and other models such as social exchange theory model and equity function (those working in tourism and with economic investment in it are more positive toward tourism). On the other hand value-attitude (VA) and value-attitude-behaviour models have been applied to assess many associations between values, attitudes and behaviours or behavioural intentions (Lindberg and Johnson, 1997). The same authors (1997) stress that such models have been used in the tourism area, 'though applications to the analysis of residents attitudes have not appeared in the literature'.

The main objective of this chapter was to identify the factors that, according to the literature, influenced the attitude of residents towards the impacts and consequences of tourism. There is a body of research on residents' reactions to tourism and this research is predominately written up from a case study perspective. However in those studies a variety of theories and methodologies were used to examine residents' attitudes. Overall the literature reveals that residents are not homogeneous in their behaviour towards tourism.

The chapter provides insights into residents' attitudes towards tourism in several stages of tourism development. Additional information about the complexity of community attitudes to tourism is provided. In effect, assessing residents' attitudes towards tourism is related to a wide range of variables. The findings, while not being consensual, suggest that further phases of research need to be conducted. However, exploring the diversity of residents' attitudes towards the impacts and consequences of tourism is an important consideration for those involved both in tourism planning and policy development. The identification of attitudes of residents and the factors that influence them provides tourism planners and managers a better platform from which to minimise the negative impacts and maximise the positive.

CHAPTER 5

TOURISM POLICY

Tourism provokes impacts, residents react to the impacts, Government reacts as well and residents respond to the responses of Government. This chapter takes into account this framework and highlights the importance of policy and politics for the development of tourism, having in mind the importance of the views of residents. The chapter also discusses the need for tourism models in the planning of consistent tourism policies.

5.1 The Meaning of Policy

Policy involves that activity which is consistent, deliberate and purposeful rather than erratic and orderless. But it is not the only way of achieving this: 'terms like 'politics' and 'management' also imply the deliberate imposition of order. In what way is 'policy' a distinctive way of shaping action?' (Colebatch, 1998, p.72). According to the same author (1998) 'politics' is a concept very close to 'policy'. In some of the most important European languages, the distinction does not exist: Politik in German and politique in French 'cover both the English Words', and it is difficult to translate 'policy-makers' into Italian. 'Politics', 'policy', 'polity' and police came from the ancient Greek word polis, meaning the city State (Colebatch, 1998). Moreover and to quote Colebatch (1998, pp.72-73): 'When the word 'policy' first emerged in English, it tended to refer to the whole pattern of governance, as in Sir Thomas Smith's 'The Manner of Government or Police of the Realm of England' (c.1565). But over time, distinct usages evolved, and as a German political scientist noted, 'policy' came to acquire in English a 'non institutional, purely intentional sort of meaning', and to be further distinguished from 'politics'. Why this happened is not clear, but it seems to be related to differences in the 'State tradition' in England as against the rest of Europe, and in particular to the development of representative government.

Parsons (1997) notes that words change their meaning and like the notion of 'public', policy is not a rigorous concept. According to the same author (1997) in some languages, such as English, the distinction between 'policy' and 'administration' is clear, in others it is not. Parsons (1997) emphasises that the Oxford English

Dictionary gives definitions of policy, covering: 'Political sagacity; statecraft; prudent conduct; craftiness; course of action adopted by government, party, etc.' Moreover Parsons (1997) notes that one dictionary of synonyms and antonyms stresses: 'Policy, statesmanship, administration, wisdom, plan, role, action, tactics, strategy, sagacity'. An as antonym, 'aimlessness'. Furthermore the Anglo-Saxon notion of 'policy' presents problems and in many European languages it is not easy the distinction between 'policy' and 'politics'. However Parsons (1997, p.14) argues: 'The modern meaning of the English notion 'policy' is that of a course of action or plan, a set of political purposes. Above all, the modern meaning of the word, dating from the post-Second World War period in particular, is that of policy as a rationale, a manifestation of considered judgement. A policy is an attempt to define and structure a rational basis for action or inaction.'

Hogwood and Gunn (quoted in Parson, 1997, p.14) present ten uses of the term 'policy'. They are:

- label for a field of activity;
- expression of general purpose or desired state of affairs
- specific proposals;
- decisions of government;
- formal authorisation;
- a programme;
- output;
- outcome;
- theory or model;
- a process.

The meaning and importance of the word policy can also be considered in a more historical approach. In effect, Machiavelli (1469-1527) was concerned with theories of government, how power worked and the need of good information for governance. Moreover he was focused on the links of ends and means, emphasising that a good knowledge of politics, would enable decision-makers both better to control the affairs and a greater capacity to deal with problems. To quote Parsons (1997, p.42): 'The

Prince still has a very modern feel to it. Policy analysis, and the analysis of policy in the twentieth century emerged for similar kinds of Machiavellian reasons: the desire to understand what actually happens in government and how governmental performance measures up to its promises. Success, performance, getting results, are ultimately the criteria by which we have come to judge those in government. Policy is the strategy by which goals are reached. Whether a policy is right or wrong does not come into it, what matters in the end is that which the policy is designed to achieve. Therein lies the only real source of legitimacy as effectiveness.'

Francis Bacon (1561-1626) has been considered a pioneer in examining policy in a modern point of view 'as a rational course of action predicated on knowledge'. Power was the exercise of knowledge and knowledge was power. For Bacon, policy was the use of knowledge in governance (Parsons 1997). Utilitarianism, of which Jeremy Bentham (1748-1832) and James Mill (1773-1836) argued the principle of utility - the greatest happiness for the greatest number - should be the trigger for both the individual actions and government policies. William James (1842-1910) with John Dewey (1859-1952) and Charles S. Peirce are known as fathers of 'modern pragmatism'. They contend that ideas are made true by events as it was possible to improve and adapt policies for the progress of mankind. To quote Parsons (1997, p.47): 'The pragmatic inheritance of Dewey and James was a call for action and for social science to become involved in the betterment of society and government. This call to a focus on problem-solving was to be a core belief of the policy approach as it was to develop in the post-war period, both in the US and elsewhere.' Following the same author (1997) two philosophers Rawls and Nozick have provided the matrix for discussion about public policy since the 1970s. John Rawls' 'A Theory of Justice' (1971) defended a model of justice with equity and Nozick's 'Anarchy and Utopia' (1974) has been an influential inspiration for the 'new right' in that it provided a huge critique of the theory and practice of Rawls' policy-making approach. Moreover theorists also concerned with policy issues are Ronald Dworkin, Thomas Nagel, T.M. Scanlon and Bernard Williams.

On the other hand Parson (1997) argues that the contribution of Popper to the philosophy of public policy was twofold. First, Popper challenged the validity of the idea of Bacon about science as induction and secondly he indicated a method of

public policy similar to scientific approach as far as decision-making is concerned. The scientific method comprises conditions in which theories could be falsified and facts do not exist independently of theories; problems exist within a structure of knowledge. ‘The problem’ which came first, the hypothesis (H) or the observation (O)’, is soluble; as is the problem, ‘which comes first, the hen (H) or the Egg (E)’. The reply to the latter is ‘An earlier kind of egg’; to the former, ‘An earlier kind of hypothesis’. It is quite true that any particular hypothesis we choose will have been preceded by observations. But these observations, in their turn, presupposed the adoption of a frame of theories’ (Popper, quoted in Parson, 1997, p.48). This argument provoked implications for both social and natural sciences. Scientific theories were those which could be ‘disproved’ or subjected to the principle of fallibility, applicable both to an open society and global society (Parsons, 1997; Soros, 1998). The ‘Popperian’ view of learning step by step and with consequences for decision making theories is presented in Figure 5.1.

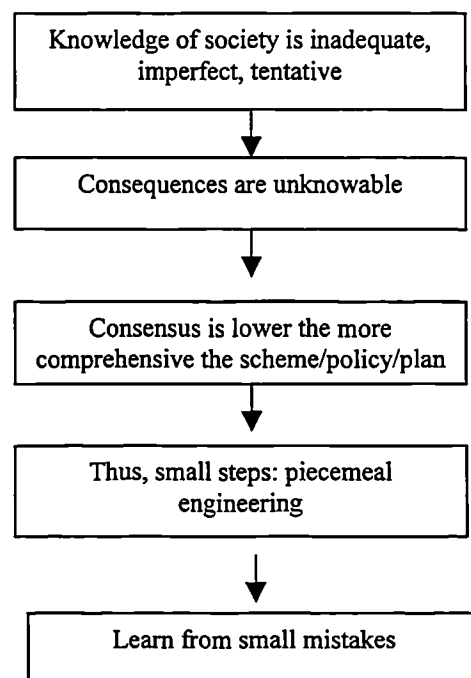


Figure 5.1 The Popperian ‘Piecemeal Engineering’

Source: Parsons, W., 1997, p.49

According to Parsons (1997) the influence of Hayek’s theories on public policy has also been relevant. Works such as ‘The Road to Serfdom’ (1944) and ‘The

Constitution of Liberty' (1960) came to the policy agenda in the 1970s in opposition to the Keynesian way of thinking. During this time Hayek also became a reference point for the 'new right'. A relevant focus of the Hayekian framework for public policy is the idea that government, or policy-makers cannot solve problems or improve on what would spontaneously come from the free relationships of free individuals and free markets. The role of public policy is to enable the spontaneous order in society and the economy to take place without interferences, in the spirit of free market economy, free competition and laissez faire economics (Soros, 1998).

On the other hand Parsons (1997) comments that if the 1960s and 1970s observed the rise and decline of Rawl's thinking about policy, and the 1980s saw the triumph of Hayekian individualism and the market, the latest framework coming at stake in the 1990s has been 'communitarianism'. To quote Parson (1997, p.52): 'The idea of the 'community' as a response to state centralism and freemarket individualism is of course, by no means new. Thus the concept is by no means the property of the 'left' or 'right'. At a time when industrialised polities confront the problem of finding new forms of governance for more complex 'Post-modern' societies, it is not entirely surprising that policy-makers should have recourse to the 'new' rhetoric of 'community'. It has a rich and varied body of theories which look likely to provide a mine of ideas for agenda setters in the 1990s. At the forefront of advocating communitarianism as an approach to public policy is Amitay Etzioni'.

On the other hand the emphasis on the importance of reason and instrumental rationality has been criticised by Habermas and Foucault, with consequences for public policy and policy analysis. Habermas proposes a model of 'communicative rationality' formed within intersubjective communication backed by language, discourse and argument. This model, influenced by Kant, Marx and Heidegger can help to promote a better communication in public policy.

5.2 The Meaning of Public

Following Parsons (1997) some terms in common use are: public interest; public goods; publicly; public sector; public health; public transport; public education; public service broadcasting; public accountability; public toilets; public order; public debt. Moreover 'public policy' is related with those areas which are called as 'public', as

opposed to ones involving the idea of 'private'. To quote Parsons (1997, p.3): 'The public comprises that dimension of human activity which is regarded as requiring governmental or social regulation or intervention, or at least common action. However, the relationship of the 'public' and the 'private' is an enduring theme which we may trace back to the beginnings of civilization.' The same author (1997, p.3) suggests that a starting point is that of ancient Greece and Rome, at the same time pointing out: 'It is from the Romans that we derive our concept of public and private: they defined the two realms in terms of 'res publica' and 'res priva'. The Greek idea of public and private may be expressed in the terms *Koinon* (roughly, public) and *Idion* (equally roughly, private)'. In Aristotle there is an attempt to solve the conflict between the public and private in the idea of the 'polis' as the best type of human association. However the relationship of the public and private spheres 'continues to predominate in contemporary arguments about the role of public policy' (Parsons, 1997, p.4). According to the same author, for political economists in the nineteenth century, government was best when it did the least and the line of demarcation for state intervention was economic freedom. Public intervention was like a framework of law, rights and order and private interests were convergent with the public interest. Following this way, as being characteristic of Britain, and contrasting with other geographical areas, Parsons (1997, p.5) states; 'This notion of the public as essentially a space which did not involve the interference in economic and business activities, and in which there was a well-defined boundary between the public and private spheres was in contrast with the continental European tradition of the public as encompassing business and trade and 'private' life to a far greater extent than that which developed in Britain and America. In France and Germany, for example, the relationship between the state and business and trade was to be markedly different to that of US and Britain'. However the liberal point of view of a clear distinction between the public and private started to disappear from the nineteenth century onwards with the incursion of public policy 'into what the political economists would have regarded as private took place in almost all areas of social life. Education, health, welfare, housing, urban planning.' (Parsons, 1997, p.5).

By 1970 the demarcation between public and private on the one hand and policy and administration on the other hand were increasingly less well defined. The 'new' liberal 'solution' 'to managing the relationship between the public and private

interests through the state was looking less defensible in the light of the 'failures' of 'public policy' in so many areas. Two ideas of 'public' were questioned: the 'public' interest motivation of bureaucrats and professionals in the public service: and the relationship between the public (qua state) and private (qua market) spheres' (Parsons, 1997, p.8). It was the 'new right' (old liberals) who mainly set the agenda for the debate. In effect, with inspiration in Adam Smith and the political economists of the nineteenth century, Hayek, Friedman and others, contended that the relationship between the public and the private 'was something which was best defined through the market and freedom of choice rather than by the state operating in the 'public interest'. During the 1980s and 1990s this argument that the demarcation between the public and private spheres should be left to the market has formed the dominant framework within which the theory and practice of public policy has taken place. This shift from the 'new' liberalism to the 'new right' in public policy may be discerned most clearly in the rise of the 'public sector management' approach and the demise of public administration' (Parsons, 1997, p.8).

The same author (1997, p.9, quoting Baber, Massey) presents lines of demarcation between the public and private sectors. The public sector has ten differences from the private sector and can be summarised as follows:

- it faces more complex and ambiguous tasks;
- it has more problems in implementing its decisions;
- it employs more people with a wider range of motivations;
- it is more concerned with securing opportunities or capacities;
- it is more concerned with compensating for market failure;
- it engages in activities with greater symbolic significance;
- it is held to stricter standards of commitment and legality;
- it has a greater opportunity to respond to issues of fairness;
- it must operate or appear to operate in the public interest;
- it must maintain minimal levels of public support above that required in private industry.

Anthony and Herzlinger (quoted in Parsons, 1997, pp.9-10) argue that the non-profit sector may be characterised by:

- the absence of a profit measure;
- the tendency to be service organisations;
- the greater constraint in the goals and strategies they can develop;
- their greater dependence on clients for financial resources;
- their greater domination by professionals;
- their accountability, which is different to a private / profit organisation;
- top management not having the same responsibilities or the same financial rewards;
- the accountability of public sector organisations to electorates and the political process;
- their lack of tradition of management control .

5.3 Policy and Management

Another concept that is an alternative to policy is management, a term which has been linked, mainly to the private sector but increasingly used in public areas (Colebatch, 1998). To quote Colebatch (1998, p.77): 'So the increasing visibility of 'management' is essentially a rhetorical shift rather than a transformation of policy. Gunn (1997, p.33) argues that there has been a succession of intellectual orientations. In the 1950s, he says, the dominant concern in the study of the public sector was with institutional reform and the term used was 'public administration'. In the 1960s, there was a new interest in planning - 'rationalist exercises in strategic decision-making' - which were associated with the term 'public policy'. In the 1980s, the concern has been to reduce public expenditure and to adopt the methods of the private sector, and the term 'public management has become common'.'

Minogue (1997) notes that it is in the public sector, where, it is difficult to 'make distinctions between 'management' and policy-making and if we examine the three well known stages of government activity (decision making, implementation, and evaluation) it can be seen that at each stage the 'policy' perspective provides a more reliable account of events than the 'managerial' perspective. According to the same

author (Minogue, 1997, pp.21-22) the limitations of managerialism can be summarised as follows:

- ‘1. Managerialism constructs a false and naive view of the policy process; in leaving out politics, it puts out the baby with the bathwater. Decisional ‘systems’ which leave out politics will produce unreal, unworkable or unacceptable decisions;
2. Efficiency is not enough;
3. Managerialism addresses itself too much to the future, too little to the past or the present. The answer to ‘bad management now’ is ‘better management in the future’; in the end, managerialism is an ‘if only’ conception. It is not rooted in present realities. Far from addressing itself in a practical way to practical men, it is principally in the business of mythmaking;
4. Managerialism conceals the inner politics of bureaucracies, by bureaucratising political exchange which are articulated as organisational exchanges. This is a deception convenient both to managers and to managerial analysts;
5. Managerialism can be successfully turned against itself merely by assertion, e.g. by using managerial concepts and language to describe ‘reality’ but avoiding real analysis by constructing a false reality; examples are provided by:
 - i) the practice of economic ministries in new states of reporting the achievement of planned objectives when these objectives have not really been met, or even implemented;
 - ii) the assertion that there exists, say, a system of management by objectives, or financial programme management, where these are not in practice effective, not intended to be, but aim to provide the semblance of a response to calls for “better management”.’

5.4 The Policy Process

From the previous discussion about the relationship between 'policy' and other terms in common use it is clear that policy is a specific way of both explaining and shaping the organisational process and the policy process. On the other hand the policy process presents two dimensions to policy, the 'vertical' and the 'horizontal'. To quote Colebatch (1998, pp.37-38): 'The vertical dimension sees policy in terms of the transmission downwards of authorised decisions. The authorised decision-makers select courses of action which will maximise the values they hold, and transmit these to subordinate officials to implement. It is a dimension which stresses instrumental action, rational choice, and the force of legitimate authority. It is concerned about the ability or capacity of subordinate officials to give effect to these decisions (the "implementation problem") and with ways of structuring the process of government so as to achieve this compliance.' Moreover this vertical dimension is in tension with the horizontal dimension with consequences for policy. Furthermore, and as Colebatch (1998,p.39) notes: 'The horizontal dimension is concerned with relationships among policy participants in different organizations - that is, outside the line of hierarchical authority. It recognizes that policy work takes place across organizational boundaries as well as within them. It is concerned with the nature of these linkages across organizations' The two dimensions are not alternatives: 'rather, each tends to assume the other but the two dimensions offer different answers to our question 'Where is policy made?' In the vertical dimension, policy is made when the authorized decision-maker gives assent, so attention is focused on the ministerial office, the Cabinet room, the Parliament. In the horizontal dimension, policy emerges from a complex set of relationships among participants ... we see a continuous process of framing and re-framing' (Colebatch, 1998, p.39). This latter dimension copes more with people, bodies and stakeholders rather than organisations. Figure 5.2 shows both the vertical and horizontal dimensions of policy.

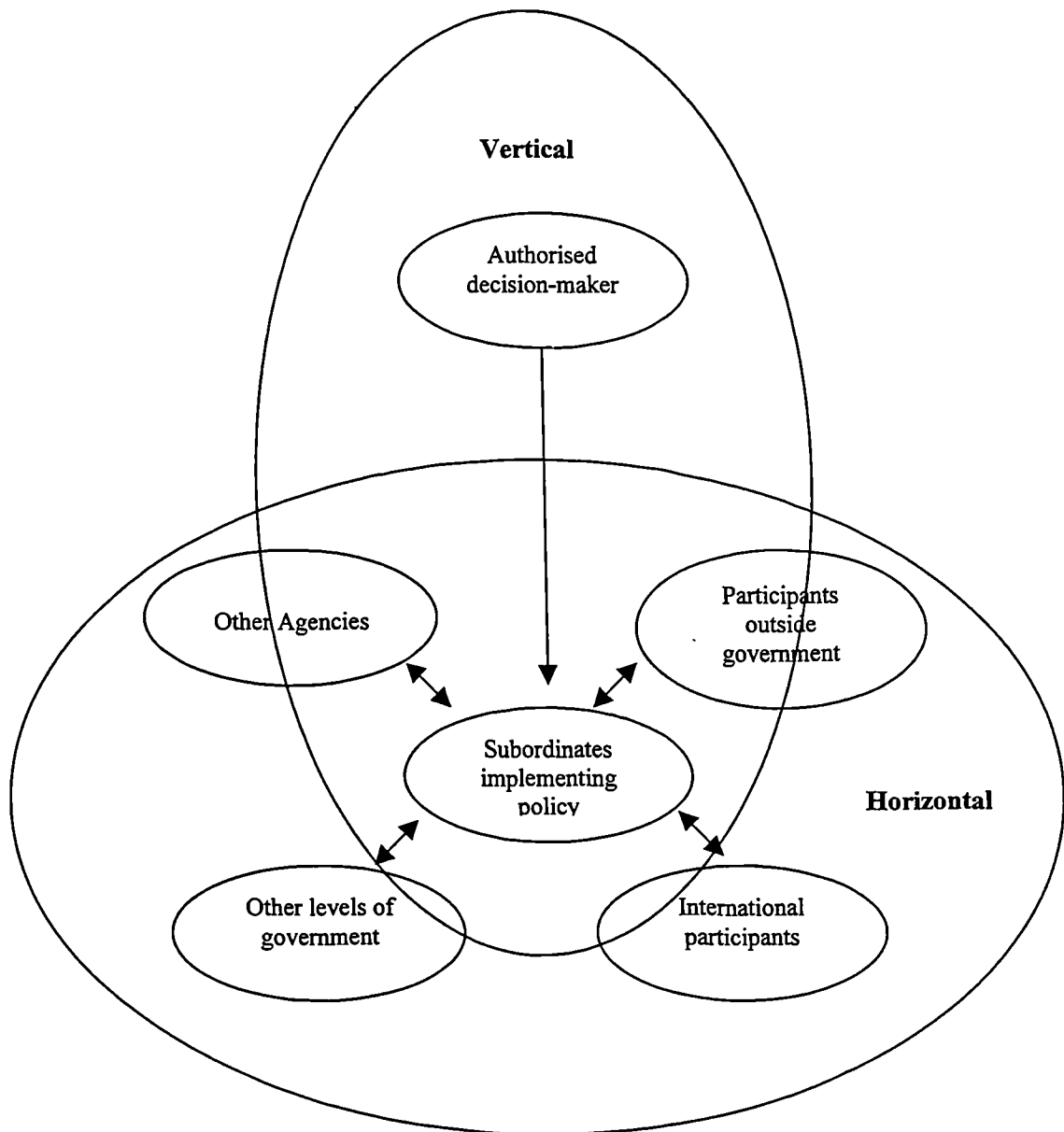


Figure 5.2 The Vertical and Horizontal Dimensions of Policy

Source: Colebatch, 1998, p. 38

5.4.1 Political/Policy Process

Following Parsons (1997, pp.39-40) the framework above mentioned consists of various approaches explaining the political context of policy-making and can be summarised as follows:

- stagist approaches: where the policy-making process is viewed with a series of steps or sequences, derived from Lasswell, Simon and Easton, and Almond.

Here policy is a process beginning with ‘agenda-setting’ and concluding with evaluation and termination. This approach is also called systems approach;

- pluralist elitist approaches: which emphasise power and its distribution amongst groups and elites (iron triangles) and how they shape policy-making ;
- new-marxist approaches: concerned with Marx and marxist point of views about policy-making in capitalist society ;
- sub-systems approaches: analysing policy-making with new metaphors such as ‘networks’, ‘communities’ and ‘sub-systems’ ;
- policy discourse approaches: examining the policy process in terms of language and communication ;
- institutionalism: lesser developed than the above, but arising as a relevant new wave of approaches to the policy process.

5.4.2 Analysis of Policy Process

Parsons (1997, p.55) emphasises that analysis has several objectives and relations to the policy process and on the other hand, policy analysis can comprise a range of activity on a spectrum of knowledge in the policy process; knowledge for the policy process and about the policy process exist along a continuum, as indicated in Figure 5.3 - varieties of policy analysis.

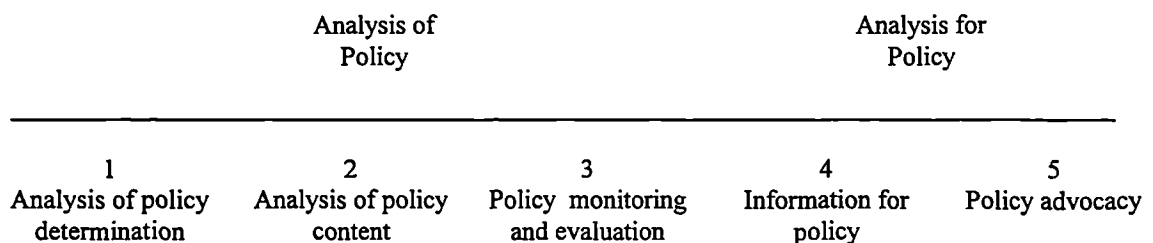


Figure 5.3 Varieties of Policy Analysis

Source: Gordon et al, 1997, quoted in Pearsons (1997), p.55

Analysis of Policy

This includes:

- policy determination: concerned how policy is made, why, when and for whom ;

- policy content: may include a description of a policy and how it links to other previous policies, or it may be supported by a theoretical/value framework to provide a critique of policy;
- Policy Monitoring and Evaluation: Examining how policies have performed in relation to goals and policy impacts;

Analysis for Policy

Including:

- policy advocacy: namely research and arguments supposed to influence the policy agenda inside and / or outside government ;
- information for policy : analysis for feeding policy-making activities.

5.4.3 Policy Analysis: Models and Approaches

According to Jenkins (1997) issues enter the political system; information feeds into decision; policies arise and are implemented with these fragmentary events linked. On the other hand, looking for a consistent logic and unity in political systems, means to conceptualise the policy process, and, one of the simplest and well known models is the classical one, first presented by Lasswell and adopted and developed by other. A presentation of this model can be seen in Figure 5.4.

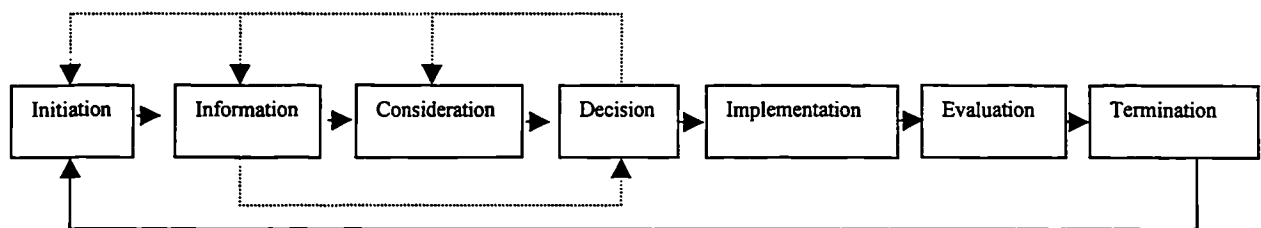
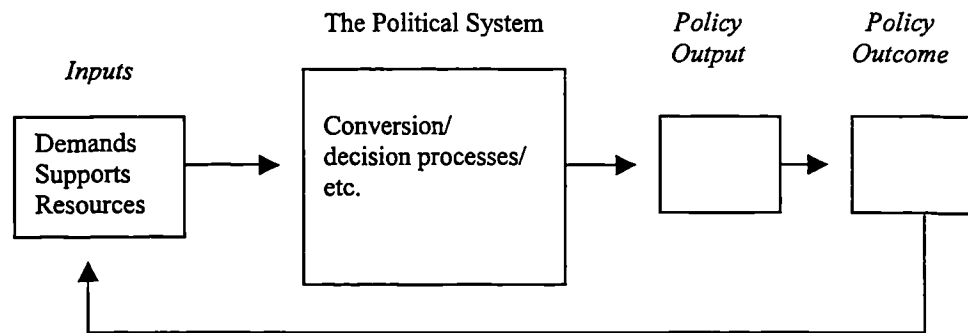


Figure 5.4 Schematic Presentation of Process Perspective on Policy

Source: Jenkins, (1997), p.32

To quote Jenkins (1997, p.31): ‘Basically, it assumes that policy emerges via a logical path; an issue moves through the political system in a processual way from point of entry, through decision and implementation, until a final choice is made to proceed with or terminate a course of action. Such a scheme, it is argued, is useful in drawing

attention to the ordering of policy activities - certain bodies at certain times are more likely to be connected with one stage of the process rather than another. Few who offer this model would consider it as anything but an ideal representation of reality and fewer still would claim that political behaviour ever takes place in such an ordered fashion'. Taking into account these setbacks, Jenkins (1997) considers that the utility of the above approach, 'particularly as a vehicle for hypothesis generation, becomes problematic' and some contended that it would be better considering the policy process with an adapted input-output model of the political system based on the work of Easton. Its main features are presented in Figure 5.5.



Environment: Includes social, economic and political influences on inputs, systems variables, policy outputs and policy outcomes

Figure 5.5 Systems Model of the Policy Process

Source: Jenkins B., 1997, p. 33

Where the assumption is the dynamics and processes of a political system operating in its environment. Thus Jenkins and its advocates 'would wish to differentiate between:

- (i) policy demands: demands for action arising from both inside and outside the political system;
- (ii) policy decisions: authoritative rather than routine decisions by the political authorities;
- (iii) policy outputs: what the system does - thus, while goods and services are the most tangible outputs, the concept is not restricted to this;

- (iv) policy outcomes (or impacts): consequences intended or unintended resulting from political action or inaction' (Jenkins, 1997, p.31).

With this model it is possible to define and explore the process of policy with the mix and interconnections as being part of the process. Furthermore Jenkins (1997) notes that via systems approaches, policy analysis can be considered as an activity involved in desegregating and understanding the policy-related aspects as far as political process is concerned.

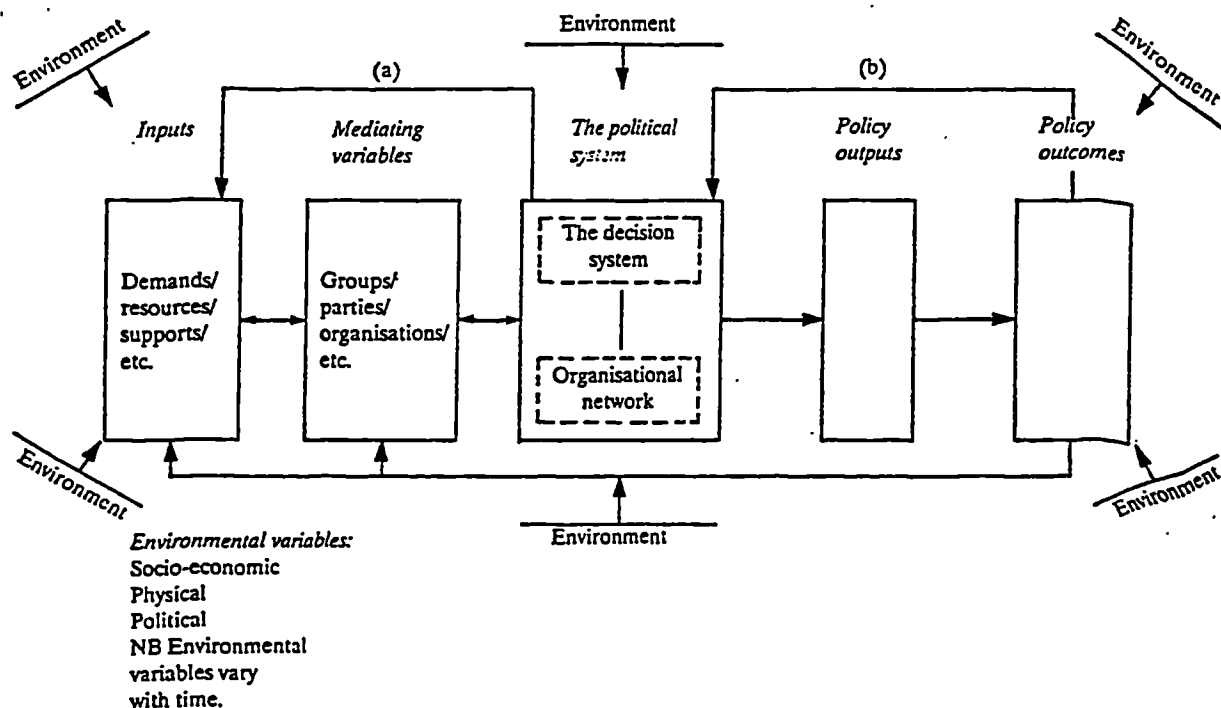


Figure 5.6 Amended Systems Model of the Policy Process

Source: Jenkins B., 1997, p. 35

Figure 5.6 also presents a systemic model. In addition Jenkins (1997) considers that the environment is not structureless and it may be involved by individuals, groups and organisations with values and interests 'operating alone or together over time'. Moreover one needs to explore the relationships between demand patterns and 'mediating variables'. Furthermore, it is important to investigate the relationship, if any, between political action and these variables over time. Also, and to quote Jenkins (1997, p.36): 'Often the process of choice may be as important as the actual choice

itself. Moreover, decisions systems may be constrained by the networks within which they operate. The latter question touches on an issue already referred above: the possible role of administrative systems in the formation rather than in the execution of public policy, a feature often missed by an analysis that concentrates on political decision-making elites. In brief, the argument here is that policy analysis needs to disaggregate and explore the political system.’ For this Jenkins (1997) suggests a distinction between decision systems and organisational networks and the capacity of political systems to influence their environment directly, presented by (a) in Figure 5.6. On the other hand interactions both across and within systems should be taken into account jointly with positions adopted by political actors which ‘have no immediate and tangible policy output’. Moreover, and as Jenkins (1997, p.37) points out: ‘a separate point concerns the relationship between decisions and outcomes. The tendency to see the latter relationship as a discrete sequence, initiated by changes in demand or support inputs, is problematic in that it may lead to the neglect of the possibility of a direct relationship between outcome and decision (see ‘b’ in Figure 5.6)’. Furthermore Jenkins (1997) emphasises behaviour and motivation as relevant to both an understanding of policy outcome and impact, stating on the other hand that such an understanding is also relevant to an investigation of other issues of the policy process, namely the internal operation of the political system itself: ‘for example, why are attempts to rationalise policy or change decision systems so often resisted?’

Finally Jenkins (1997) emphasises that the starting from a systems point of view may pose problems like accepting uncritically a goal model organisation, of adopting the assumptions of welfare economics, of ‘shipping towards’ a pluralistic model of politics.

5.5 Policy Activity

Policy can be seen both as an object and a process. The current usage is to see policy as an object: these are things called ‘policies’ (Colebatch, 1998), the National Tourism Policy, the Regional Tourism policy - and policy activity is the making of these policies. On the other hand policy is a process in the way that even if there are statements they will not manifest the complexity of the action. However the two perspectives are complementary being another aspect of the distinction between the vertical and the horizontal dimension of policy (Colebatch, 1998). Following the same

author (1998) rather than to identify 'policy-makers', it is more valuable to ask, first what types of activity give rise to policy and secondly, who are the people who are doing this activity and in what organisational framework. To quote Colebatch (1998, pp.89-90): 'And the best place to start is with the components of policy which we identified at the outset: authority, expertise and order. What are the sorts of activity associated with these?' According to the same author (1998) the three activities can be summarised as follows:

1. Authority

The policy process implies the mobilisation of authority; Ministers (or Cabinet) make decisions, and legislators pass statutes therefore being 'policy actors'. However the policy has to be channelled to the source of authority. Moreover there are procedures in the responsibility of specialist officials who are 'policy workers'.

2. Expertise

One of the attributes of a policy is the mobilization and the existence of a 'body of experts'. Some of them are officials in government agencies; others are academics or lobby groups or businesses, or consulting firms.

3. Order

Policy 'involves the creation of order - that is, shared understandings' how the participants will behave in particular situations. On the other hand, order involves values and interests and questions regarding organisation.

Furthermore, as Colebatch (1998, pp.91-92) points out: 'We have clarified what is involved in the activity of policy, but this does not identify distinct types of policy activity - some concerned with authority, others concerned with expertise, etc. - because the elements are intertwined with one another so we cannot use this analytic clarification to sort the policy participants into categories, but it does help us to clarify the differences between the sorts of policy activity in which the various participants are engaged. It helps to think of them in terms of some fairly broad general types: leaders, aides, followers, executives, maintenance staff, interested parties and knowledge workers'.

Minogue (1997) notes that too many policy scientists share the management that scientists tend to 'leave out the politics', or putting it another way and he advocates (1997, p.25) that there will be no true theory of public policy making 'which does not convincingly account for political phenomena as well as organisational reality. And it is unlikely that an adequate theory can be produced, when it is primarily in the hands of those who do not inhabit the actual world of public political organisations and only get occasional glimpses of that world. These glimpses mean that much theoretical work is shot through with flashes of illumination, but the flashes seem so bright because of the prevailing darkness'. Moreover, practitioners themselves are part of the problem (Minogue, 1997). According to the same author (1997) self interest pushes them to concealment more than open dealing, to disguises more than revelations. It is an organisational virtue to hide policy information and policy analysts especially to those outside the organisation 'even 'insider' analysts may often find themselves treated with reserve and suspicion'. In addition and to quote again Minogue (1997,p.26): 'The greatest weakness of the practitioner is the inability to perceive himself, and to understand that all his own actions and activities are just as ideologically framed as the theories of the non-practitioner. The 'pragmatic' bureaucrat is just as beset by values, beliefs and preferences as the 'objective' academic. Both produce work, which rests on assumptions, even on worldview. Neither can really sustain a claim to objectivity. Just as there is no such thing as value free social science, so there is no such thing as value free administration or value free public policymaking'.

5.6 Policy: Theory and Practice

The term government associated with policy is problematic because those involved in the making of policy are not the same as government. Some of these people are 'non-governmental' partners. On the other hand and according to Colebatch the source of the difficulty for a definition of policy is that there are, both in the academic literature and in the practitioners, different points of view about policy: one about authorised choice, and the other about structured interaction. To quote Colebatch (1998, pp.102-103): 'The authorized choice perspective assumes that policy is indeed about 'governments making decisions', and focuses on such decisions the structure interaction perspective does not assume a single decision-maker, addressing a clear policy problem: it focuses on the range of participants in the game, the diversity of

their understandings of the situation and the problem, the ways in which they interact with one another, and the outcomes of this interaction'. These two approaches frame the action in divergent ways and Colebatch (1998) considers that people respond to these divergences in different ways which can be summarised as follows:

1. A Reform Agenda

This divergence between ideal and practice provokes a reform agenda and the goal of reform should be to make 'authorized choice' as being the practice, and not a theoretical task. In this framework the emphasis on policy is a reformed move: 'paying attention to outcomes rather than process, making choices in order to accomplish priority goals rather than because of habit, political pressure or technological inertia ... The systematic linking of policies, needs and outcomes should also ... flow through the working of government generally, which must be understood as an instrument for the accomplishment of policy objectives' (Colebatch, 1998, p.103).

2. Theory and Practice

Another usual reaction, especially amongst practitioners, is to consider 'authorized choice' as practice. 'For example, in theory, policy is made by government making a clear choice of the most effective response to a known problem, but in practice it emerges from struggles between powerful interests pursuing different agendas and is marked by contest and uncertainty' (Colebatch, 1998, p.104). Moreover the same author (1998) notes that the knowledge that policy workers have about the policy process - about position and negotiation and compromise and commitment - seems to be different in relation to the academic perspective about problem-solving and the policy cycle. To quote Colebatch (1998, p.104): 'They respect the trappings of authorized choice - the systematic study of needs, the ordering of options, the calculation of costs and benefits -but it is seen as being somewhat remote from the 'real world'.

3. An Analytic Tool

For some writers, the development of a model of policy as authorised choice can be useful to understand the policy process 'even though the process does not resemble the model'. For example a model of policy as cycle of applied problem -solving (agenda setting; policy formulation; decision making; policy implementation and policy evaluation). This can be considered as a facilitator

for understanding public policy-making and can provide a better understanding of practice.

4. An Organisational Construct

Colebatch (1998) observes that policy emerges from an 'organizationally-complex process' where the formal model is relevant. Moreover, he argued (1998) as follows:

- (i) policy has a horizontal and vertical dimension;
- (ii) policy is about linkage as much as problem-solving. The policy process is like 'the knitting-together' of the participants which requires a number of conditions, namely:
 - time;
 - a degree of shared understanding;
 - organisational settings(conferences);
 - functional specialization;
 - participants come from inside and outside government.
- (iii) the rational model has symbolic importance;
- (iv) the model frames appropriate behaviour;
- (v) the framing is predominantly vertical.

The concept of policy is dominated by vertical dimension, 'with its stress on authorized choice, known goals and clear outcomes, but functional specialization means that the policy concept has to be broadened to take in the horizontal'(Colebatch, 1998, p.109).

However, he notes (1998) that the horizontal dimension has received more importance with the development of the concept of stakeholders, 'people or organizations who had an interest in what the organization did and who are entitled to be heard and to be taken seriously. But this still carries less weight than the vertical: in the public presentation, it is for the authorized leaders to decide how much voice the stakeholders should have' (Colebatch,1998, p.109).

- (vi) This means ambiguity about decision-making. Recognizing the claims of stakeholders 'qualifies the notion of policy emerging from decisions by authorized 'leaders' and accepting 'the horizontal claims of

stakeholders' practitioners are concerned to do it in a way which favours the authoritative decision. To quote Colebatch (1998, p.110): 'Referring to the process as 'advising' preserves the position of the Minister as the person making the choice. The public inquiry also provides an opportunity for stakeholders to negotiate policy change which can then be announced by the Minister'.

Colebatch (1998) concludes that policy is a term used for the structuring of collective action, mobilising a model of government and governance as 'authorized decision-making'. Furthermore, he emphasises three main statements about policy:

- policy is a process as well as an artefact;
- policy is concerned with creating coherence in the face of continuing ambiguity and contest;
- policy is problematic and graduated rather than definitive and absolute.

As a consequence 'The focus shifts from 'Is there a policy, and if so, what is it to? 'In what sense is there policy, and what impact does it have? The term is not a scientific absolute, but a socially constructed variable. Policy is a concept which we use to make sense of the world - but we have to work at it' (Colebatch,1998, p.114).

5.7 The Society of Networks: a Challenge for Public Policy

Following Fukuyama (1997) there is by now a large amount of literature about the rise of the network as an intermediate type or organisation between traditional markets and hierarchies. On the other hand he states (1997) that 'there is a general consensus that large, hierarchical organisations are in trouble', and many supporters of 'the information revolution' have seen the rise of the Internet 'not simply as a useful new communication technology, but as the harbinger of an entirely new, non-hierarchical form of organization uniquely adapted to the requirements of a complex, information-intensive economic world' (Fukuyama, 1997, p.64). The same author (1997) states that substantial literature accompanies the change in formal organisation.

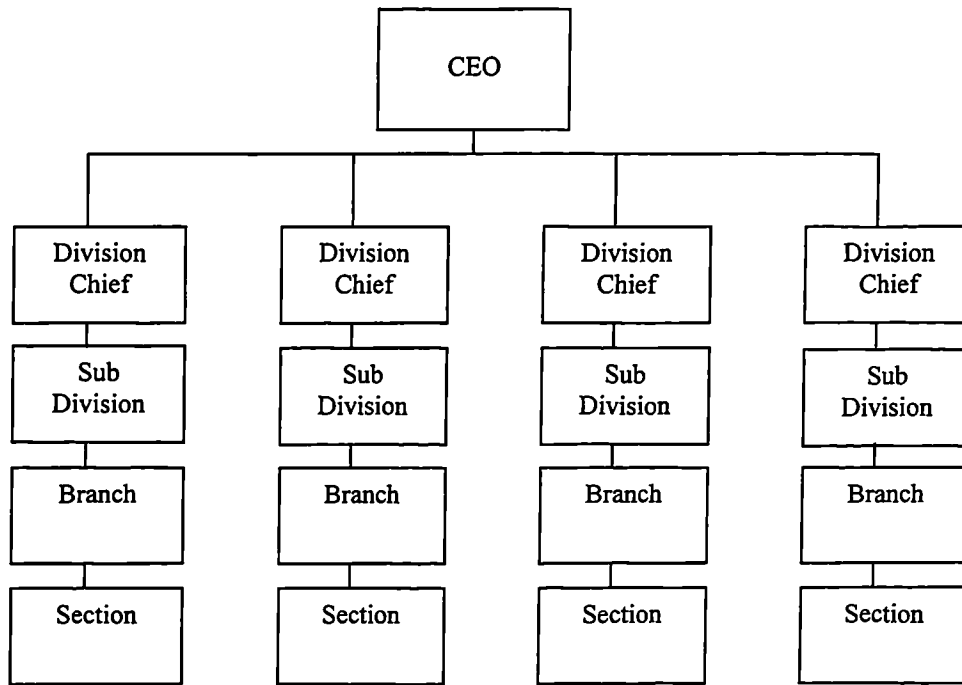


Figure 5.7 Traditional Hierarchy

Source: Fukuyama, 1997, p. 64

Figure 5.7 outlines the classic pyramidal structure of a hierarchical Taylorite organisation, while Figure 5.8 presents the implications of ‘organizational flattering’.

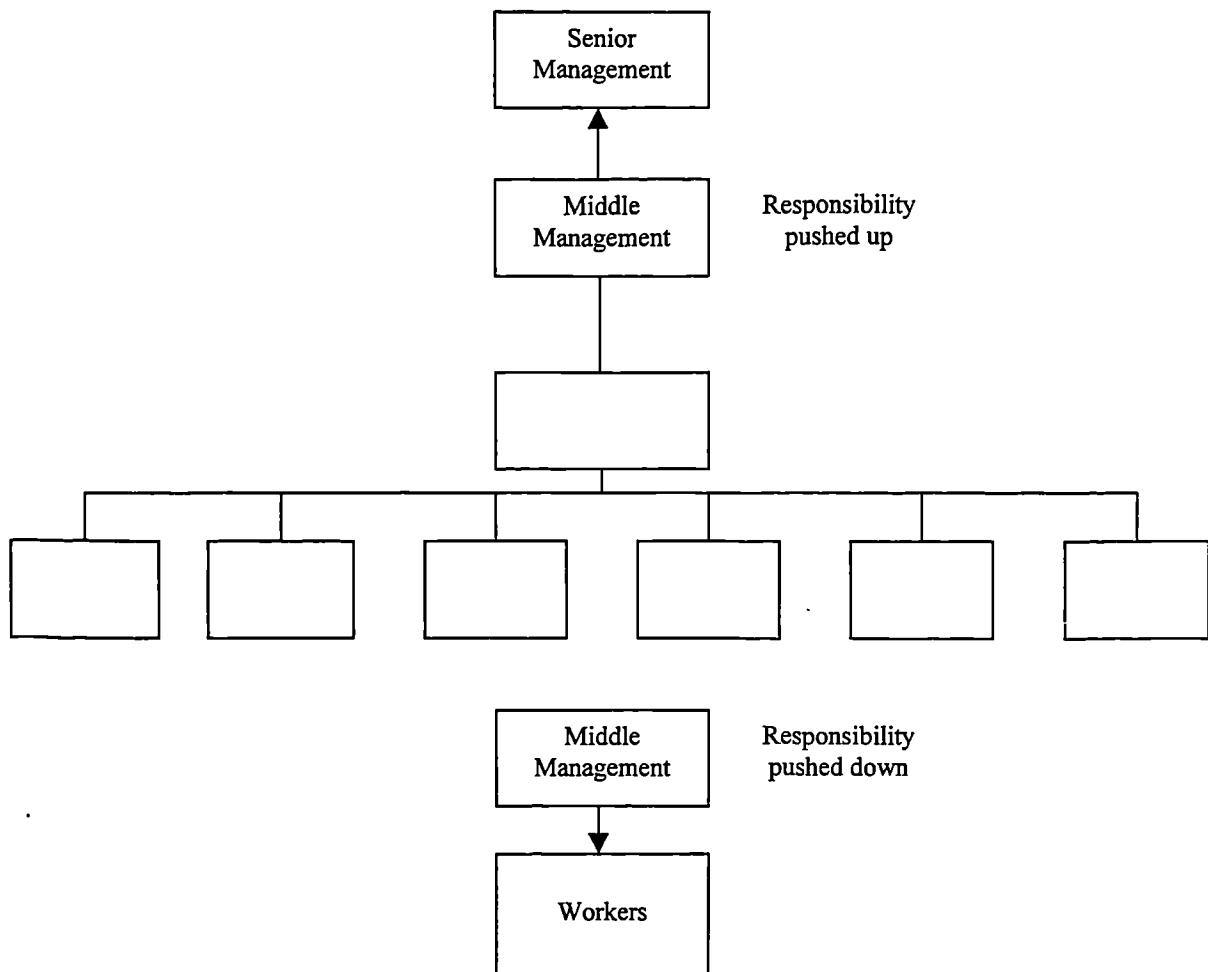


Figure 5.8 The Flat Organisation

Source: Fukuyama, F., 1997, p. 65

To quote Fukuyama (1997, p.65): 'The flat organization remains ultimately a centralized and hierarchical one; all that has been changed is the number of management layers intervening between the top and bottom. Flat organizations create enlarged spans of control; properly executed, they should not overburden senior managers with micromanagement responsibilities, but rather should push down authority to the lower levels of the organization'.

On the other hand and following Fukuyama (1997) sociologists have used the concept of 'networks'. However, their definition is hugely broad and comprises both markets and hierarchies as they are seen by economists. In addition, Fukuyama (1997) notes,

that there is a lack of precision in the concept of 'network' among the management specialists. As a result some people understand the network as a category of formal organisation in which there is no formal source of 'sovereign authority' (see Figure 5.9).

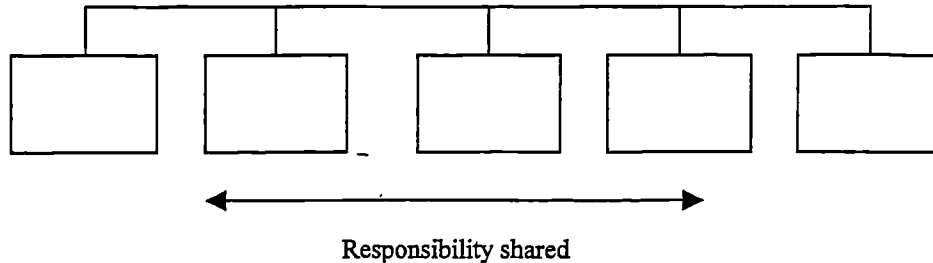


Figure 5.9 Networks: Radical Decentralisation

Source: Fukuyama, F., 1997, p. 66

Others consider it to be a mix of informal relationships or alliances between organisations, 'each of which may be hierarchical but which are related to one another through vertical contractual relationships' (see Figure 5.10).

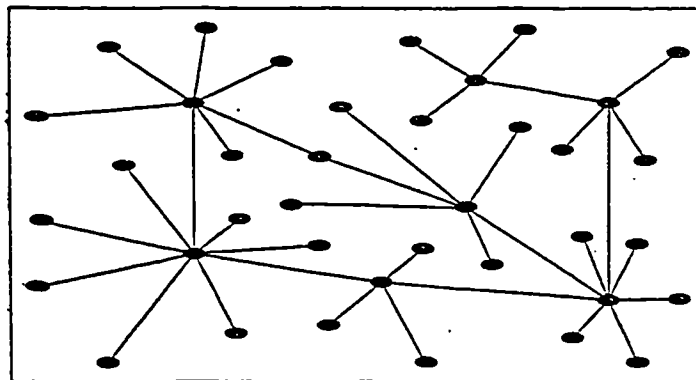


Figure 5.10 Networks: Informal Alliances

Source: Fukuyama, F., 1997, p. 67

Fukuyama (1997) also provides examples of Japanese 'keiretsu' groups, alliances of small family firms in Central Italy and Boeing's links with its suppliers. On the other hand, Fukuyama (1997, p.4) defines social capital as being 'a certain set of informal values or norms shared among members of a group that permit co-operation among them the norms that produce social capital must substantively include virtues like truth-telling, the meeting of obligations and reciprocity. Not surprisingly, these

norms overlap to a significant degree with Puritan values Max Weber found critical to the development of Western capitalism'. In addition, Fukuyama (1997) argues that the social capital approach provides ground for defining a network in a more precise way enabling a better understanding what its economic function really is. In this perspective, a network does not define a kind of formal organisation, but more a moral relationship of trust. As a consequence, Fukuyama (1997, p.67) suggests that a more consistent definition would be: 'A network is a group of individual agents that share informal norms or values beyond those necessary for ordinary market transactions'. From this point of view Fukuyama (1997) notes that the norms and values can vary from reciprocity shared between two friends, to the value systems built by organised religions. In the same way a society like the United States is 'characterized by a dense, complex and overlapping set of networks' (see Figure 5.11).

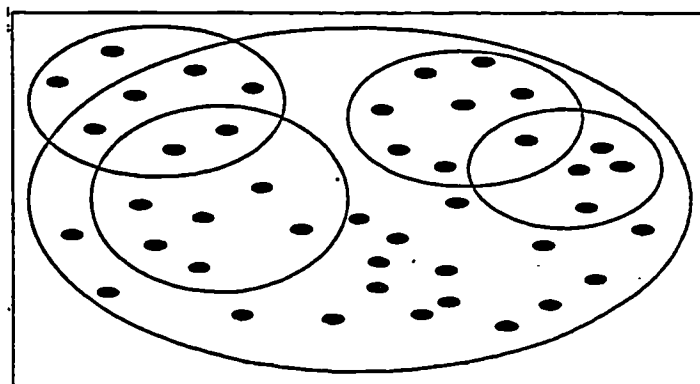


Figure 5.11 Networks of Trust Overlap

Source: Fukuyama, F., 1997, p. 68

From the above definition, Fukuyama (1997) extracts two features. Firstly a network is different from a market because networks are defined by their shared norms and values and as a consequence exchange among members of a network is different because the shared norms provide them a huge purpose 'that distorts the market relationship'. On the other hand, a network is different from a hierarchy since it is based 'on shared informal norms and not on a formal authority relationship. Understood in this sense, a network can coexist with a formal hierarchy. Members of a formal hierarchy do not have to share norms or values with one another beyond the wage contracts that define their membership; formal organizations, however, can be

overlaid with informal networks of various sorts, based on patronage, ethnicity, or a comm.

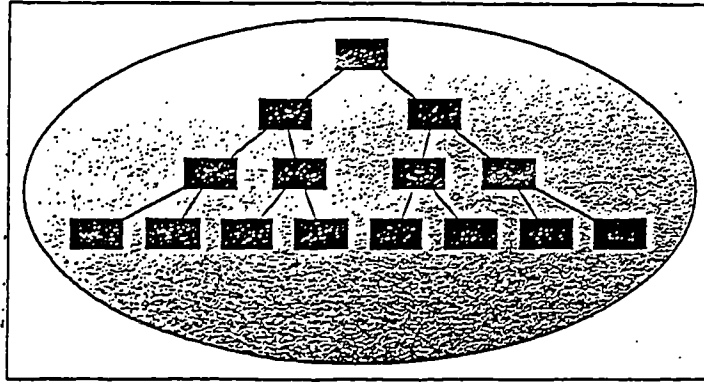


Figure 5.12 A Corporate Culture

Source: Fukuyama, F., 1997, p. 69

Figure 5.12 presents a formal hierarchical organisation, in which all of members share a common corporate culture. However, Fukuyama (1997) contends that while networks can coexist with formal organisations, they can even replace formal organisations. Moreover, when networks 'are overlaid on top of formal organizations' this can be a source of organisational dysfunction. To quote Fukuyama (1997, p.70): 'Everyone is familiar with patronage networks based on kinship, friendship, love or some such factor. Members of such a network share important norms and values with one another (particularly reciprocity) that they do not share with other members of the organization'.

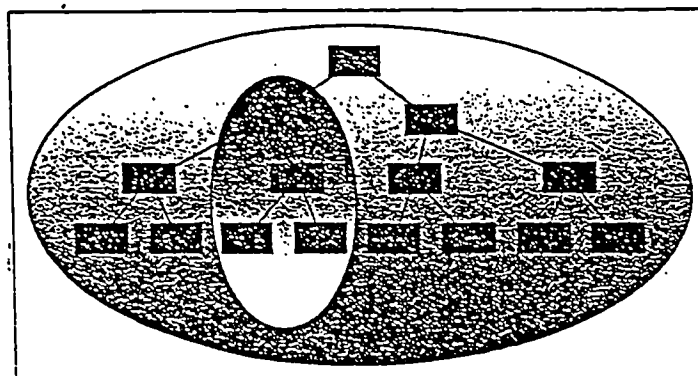


Figure 5.13 A Patronage Network

Source: Fukuyama, F., 1997, p. 71

Figure 5.13 illustrates a patronage network 'superimposed' upon an organisation with a common corporate culture. In this type of network information flows readily, 'but its outer boundaries constitute a membrane through which information passes much more readily'. Furthermore networks, seen as informal ethical relationships, can be linked with phenomena like 'nepotism', 'favouritism', 'intolerance', 'inbreeding' and 'non-transparent, personalistic arrangements'. However, networks are relevant in that they provide alternative channels for the amount of information through organisations and they can give an answer to co-ordination within conditions of increasing complexity.

Barwise and Hammond (1998) emphasise that twentieth-century communication technologies - telephones, cars, planes, radio, television, have had huge effects in everyday life. Accordingly, since the mid - 1990s communication technology and its potential effect became 'hot topics'. From this point of view 'We are in the early stages of a revolution comparable in scale to the biggest changes ever experienced by humans - the development of language, the change from hunter-gathering to farming, or from farming to industrial production this revolution and the society it heralds have been variously described: the 'information age', 'cyber-society', the 'third wave' we use the term digital revolution to draw attention to its defining characteristic: the conversion of every kind of information into digital data'(Barwise and Hammond, 1998, p.2).

Mulgan and Briscoe (1997) contend that technologies both transform the organisational forms and sometimes make new organisational forms necessary. The car, for example provoked a new infrastructure of garages and services stations; the telephone made possible to manage dispersed operations in real time and the car originated the suburb and the supermarket. The same authors (1997) note that today a new wave of technologies is again modifying the nature of organisations. Virtual companies arose without an office and in some cases with any staff. Small software companies are appearing and becoming corporate giants. Traders work to the world markets from home. As Mulgan and Briscoe (1997, pp. 339-340) put it: 'Given the extraordinary level of innovation in organizational forms it is remarkable that most commentators take it for granted that the age of cyberspace will be based on the classic organizational models of the twentieth century. There is no shortage of

imagination about the technologies and uses of the information superhighway, but it is still widely assumed that the networks of the twenty-first century will be organized in the same way as the infrastructures of the past, either as publicly owned corporations or as regulated private ones'. The same authors (1997) argue that the types of organisations which dominated this century were built for 'an age of materially based industry', for 'economies based on hardware', and 'for relatively uneducated workforces'. Their main features were namely uniformity, standardization, pyramidal management and 'unified ownership'. As Mulgan and Briscoe (1997, p.340) say: 'Within the organization the norm has been to have hierarchical command structures exercising control over dispersed production processes, flows of goods, and over labour, much of which has been devoted to precisely definable repetitive tasks, whether in the factory or the classroom, the government office or the hospital'.

The information age, on the other hand challenged these 'models of behaviour and production' in two ways, according with the same authors (1997). The first has a tendency to support difference rather than uniformity. Employees performed tasks consistently and predictability. By contrast as far as information and knowledge are concerned, the value added per employee is less predictable and linked with creativity. The second huge difference 'is that far faster flows of information make it possible to organize in far more complex ways, with networks or flotillas or organizations joined together loosely, rather than depending on integrated command structures'(Mulgan and Briscoe, 1997, p.340).

Furthermore these differences are notorious as far as infrastructures are concerned. Where the former infrastructure gave rises to 'largely undifferentiated product', for instance gas, electricity or water, or an 'undifferentiated carrying capacity' like motorway, in the information age on the contrary 'what is required is a far more varied set of services, ranging from mobile communications to databases. And where the classic firm and the classic infrastructure could be vertically integrated, those of the information age seem to work best by articulating diverse types of service supply and diverse types of use' (Mulgan and Briscoe, 1997, p.340). In addition those that have fit their organisational structure towards the information age are more successful than those embedded to older models. And as Mulgan and Briscoe (1997, p.341) observe: 'One of these is the Internet, the fastest growing medium in human

history. The Internet, is not owned by anyone, but makes use of leased lines to interconnect different public and private networks. There is no substantial physical body underlying the whole operation - which is why the term 'cyberspace' was coined to describe the virtual realm inhabited by 'netsurfers'. Central to the popularity of this 'network of networks' is its distribution of intelligence and innovative capacity throughout the system. The Internet is essentially a 'bottom-up structure'.

On the other hand the second model of an information age type of organisation is Visa, as far as financial services are concerned. The same authors (1997) observe that Visa operates a credit card service which is owned by a huge amount of financial institutions (more than 20,000) offering its cards and services. Visa itself is a 'skeletal administrative organization' setting up the operations of its partners into a 'cohesive and efficient whole'.

These forms of organisation (Internet and Visa) present broad infrastructures incorporating diversity, competition and multiform lines of power with consequences for the areas of markets for information. Moreover, democratizing ownership and power they constantly absorb new ideas, within the framework of a 'neo-biological technology', different from the mechanical model, and where the 'information superhighway' is like 'a supermarket of options' inserted in a model called a 'Society of Networks' (Mulgan and Briscoe, 1997). Furthermore, it seems, that there would still be great motivation to improve both the network and the technology giving opportunity to minimise the costs of access due to service providers wanting to maximise market and demand for their services. As a consequence and to quote Mulgan and Briscoe (1997, p.345): 'Structures of this kind seem to defy the logic of organizations in the industrial age. In place of the industrial model of organizations defined by their boundaries, according to this view the most important characteristic of any organization is its range and number of points of connection to the outside environment: its connectedness. This is the virtue of the Society of Networks model'.

5.8 Tourism Policy

Neither the political science of tourism nor tourism policy has received substantial attention. However the tourism industry will have to deal with huge and increasing challenges over the next years. Managers, executives and decision-makers and takers

in general are faced with present and future policy decisions on tourism issues and 'will need a managerial framework for analyzing the various alternatives so that a course of action can be selected' (Edgell, 1987, p.23). Following the same author (1990) Marco Polo is the 'cornerstone' for the development of tourism policy due to being the 'first major traveller to make rational sense out of travel, to give it some direction, and to help us understand how travel impacts on the rest of the world's activities. He identified sociocultural aspects of travel, environmental conditions at the time, and the rustic setting of travelling in sparsely populated areas' (p.8). On the other hand and according to the same author (1990) if Marco Polo is the pioneer of tourism policy, we have to wait about 700 years to identify modern tourism policy. It occurred at different stages in different places of the world but, and to quote Edgell (1990, p.9): 'if forced to choose one place and time from where today's tourism policy emanated, I would select Europe immediately following World War II tourism was seized upon as a prime tool for economic development and a potential source for quickly earning badly needed foreign exchange'. Furthermore, Edgell (1990) points out that the 1990s may be considered in the years ahead as the most important period for formulating policies on tourism. In addition the leaders, executives and planners of the tourism sector have started to realise the need for a greater emphasis on policy. 'There is a need for greater articulation of tourism policy goals and objectives arrived at through deliberate and conscientious discussion. The problems of tourism are known, the importance of tourism is known, and now it is time to present guidelines for tourism policy formulation, no matter how loosely structured' (Edgell, 1990, p.98).

According to the same author (1990) whether it to be at the local, regional, national or international level, it is policy that determines the goals and objectives and gives rise to guidelines for tourism development. As a consequence the policy agenda may be different for developing and developed countries, or the stage of tourism development may differ, but 'it is policy that drives the other aspects of tourism, whether it be on the demand or on the supply side' (Edgell, 1990, p.98). In addition tourism policy should be dynamic, in relation to changing conditions (political, social, or economic) should be fitted to as the policies are formulated and implemented. To quote Edgell (1990, p.99): 'Many influences may cause a policy to shift in one direction or another. These may take the form of government policy at the city, state (or other territorial

division, depending on the country) or federal level. In some countries, private sector influences shape national tourism policy. In addition, most countries have laws and regulations that influence policy decisions on tourism. Also of importance are the influences exerted by international tourism organizations’.

On the other hand there are many influences, causing a policy to change. These may be tourism government policy, at several levels and influences from the private sector ‘which shape national tourism policy’. Moreover laws, regulations and international tourism organisations also influence tourism policy.

According to Cooper et. al., (1993) there are huge variations in the structure of the administrative framework, which in turn depends on the dimensions of the tourism industry and the relevance the government gives to the various motives advanced for public-sector involvement in tourism. According to the same authors (1993, p.149) a list of the most usual reasons for government participation are:

- ‘Foreign exchange earnings and their importance for balance of payments.
- Employment creation and the need to provide education and training.
- Large and fragmented industry requiring careful co-ordination of development and marketing.
- Maximize the net benefits to the host community.
- Spread the benefits and costs equitably.
- Building the image of the country as a tourist destination.
- Market regulation to protect consumers and prevent unfair competition.
- Provision of public goods and infrastructure as part of the tourist product.
- Protect tourism resources and the environment.
- Regulate aspects of social behaviour, e.g., gambling.
- Monitor the level of tourism activity through statistical surveys.’

Where tourism is an important tool of economic activity it is usual to have a Ministry of Tourism. The position of the NTO may be inside or outside the Ministry. Following Cooper et. al., (1993) when the NTO is outside, the Ministry becomes a government agency or semi-governmental body. It can have a separate constitution,

enacted by law, and a board of directors from outside government but the link is maintained through the NTO as being the 'beacon' of government policy. In addition some NTOs, usually called visitor and convention bureaux, are private associations, which may have government representation. To quote Cooper et. al., (1993, pp.149-150): 'Income is thus raised from a variety of sources, and, like other businesses, the existence of these bureaux is dependent on the demand for their services in the market place. In times of recession, such associations often have difficulty raising funds from the private sector to maintain their activities, and they need to have injections of public funds to continue with long term projects'.

During the 1980s, Cooper et. al., (1993) state that with the upsurging of market economies more and more governments urged their NTOs to generate funding from the tourist private sector (Baum1994; Braulich et. al., 1995; Wanhill 1995; Lavery 1996; Pearce 1996; Mansera 1998). Furthermore tourist organisations, their structures and functions, have only recently been the subject of systematic attention from researchers and little work does exist about the institutional frameworks from which tourism emerges (Pearce 1992; 1996). The latter author (1996) argues that the work that has been done shows that networks of tourist organisations, from the local to the national level, exist in many countries, having a range of functions such as marketing, visitor servicing, development planning, research and regulation -which can influence the tourism development policy. To quote Pearce (1996, p.307): 'While common features and patterns may be found, tourist organisations tend to differ in terms of their structure, funding and the number and types of functions they perform, leading this author to conclude, in a comparative study of tourist organisations in six countries, that: there is no single best type of (tourist) organisation nor inter-organisational network; rather each country must evolve a system which best reflects local, regional and national conditions'. In addition Pearce (1996) examines the changing institutional framework for tourism in Spain in the post Franco era and expands the analysis upon the new type of regional tourist organisations and their relationship to national tourist organisations. The regional context is outlined jointly with discussion of the structure and functions and a range of inter-organisational issues are analysed having support in several case studies. Moreover and as Pearce (1996, p.308) puts it: 'More generally, this Catalan case study may also serve to illustrate further the need to include local and regional examples in research on tourist

organisations (national bodies have received most attention to date), and to incorporate discussion of tourist organisations more fully and explicitly when community issues in tourism are being addressed’.

In relation to public sector involvement with tourism (Airey and Chopping 1980; Joppe 1989a; Joppe 1989b; Wanhill 1995; Barnard 1989), both directly or indirectly suggest that the government has several tools which can be put forward to manage tourism. The way in which, the actions from governments influence tourism may be classified from the point of view of demand or from the perspective of the supply. According to Cooper et. al., (1993, p.152) the principal policy instruments to manage **demand side** are:

- marketing and promotion;
- information provision;
- pricing;
- controlling the access.

The instruments of the **supply side** of tourism industry are as follows:

- land use planning and control;
- building regulations;
- market regulation;
- market research and planning;
- taxation;
- ownership;
- investment incentives.

According to the same authors (1993, p.159) the range of policy instruments available to government is huge and ‘enables the public sector to exercise varying degrees of influence over the direction of tourism development. Around the globe governments have intervened to assist and regulate the private sector; this is because the complex nature of the tourist product makes it unlikely that private markets will satisfy all the tourism policy of a country. As noted previously, the extent of public involvement depends on the economic philosophy of the government. The trend towards pure market-led economies in the 1980s led to a clawback of state involvement and the questioning of intervention as more likely to lead to market distortions than market

corrections'. On the other hand this is in contrast to the concept of sustainable development and sustainable tourism which challenge the public sector, the private sector and the residents.

5.9 Tourism Policy Decision Making Process

5.9.1 Edgell Contribution

Edgell attempts to suggest a tourism policy decision-making process (1987; 1990). He notes that very little has been written about the process of making policy decisions in the tourism sector. For most countries, 'the policy decisions regarding tourism have focused on only two goals: maximizing tourist arrivals and improving the balance of payments through international tourism receipts' (1990, p.103). Following the same author 'one attempt to emphasise the need for systematic planning for policy decisions in tourism took place during the joint national meeting of the Operations Research Society - The Institute of Management Sciences, Miami Beach, Florida, November 3-6, 1976 in a paper, 'Public Policy Planning and Operations Research in the Tourism Sector: Never the Twain Shall Meet - or Shall They?' by Edgell et. al., (1976)'. A conceptual representation of the current policy process was presented (Figure 5.14) and in the same work a system model was also presented (Figure 5.15).

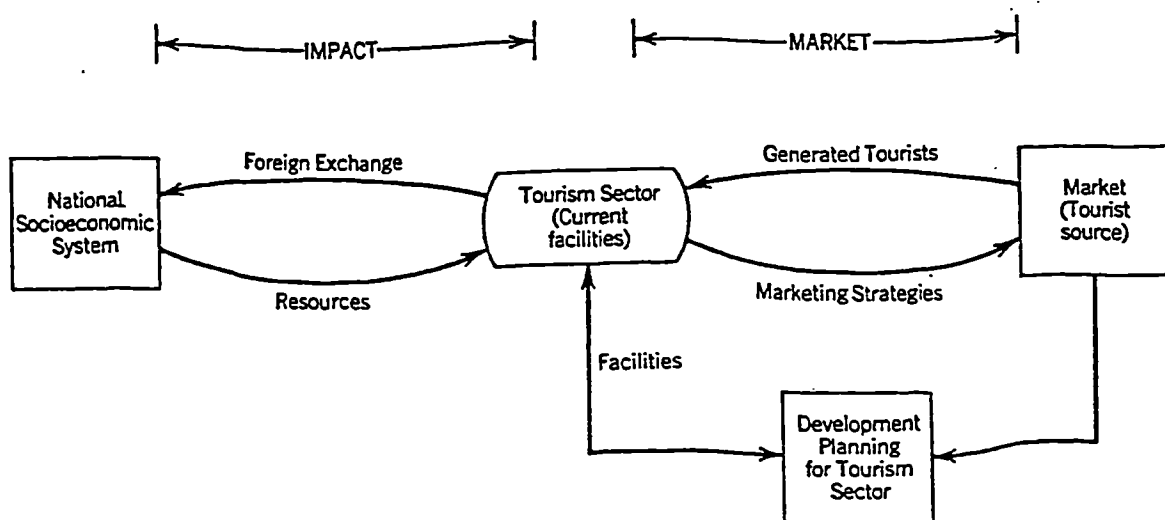


Figure 5.14 Conceptual Representation of Current Process

Source: Edgell, D. L., 1990, p. 103

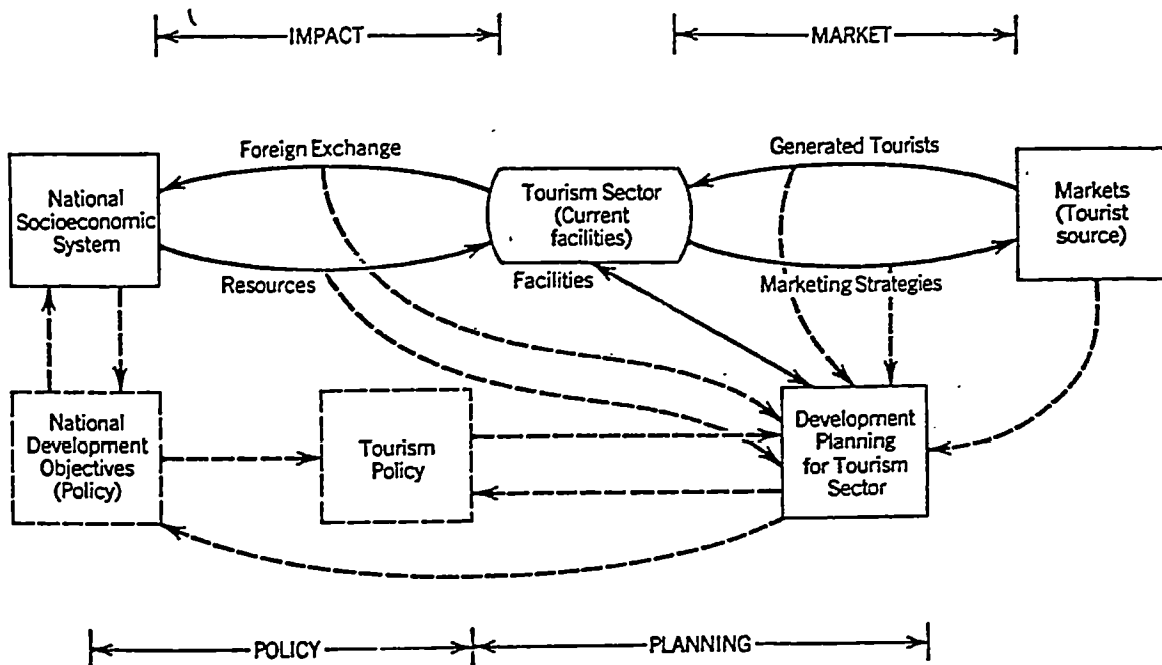


Figure 5.15 Conceptual Representation of The System Model of the Tourism Sector

Source: Edgell, D. L., 1990, p. 104

The same author (1990) notes that on any tourism issue the policymaker does not make a decision 'in a vacuum nor always in the same way'. The policymaker has goals and objectives as an indicative in the decision-making process. These also vary according to countries., regions and areas. Moreover, other considerations should be taken into account. This is illustrated, visually in Figure 5.16.

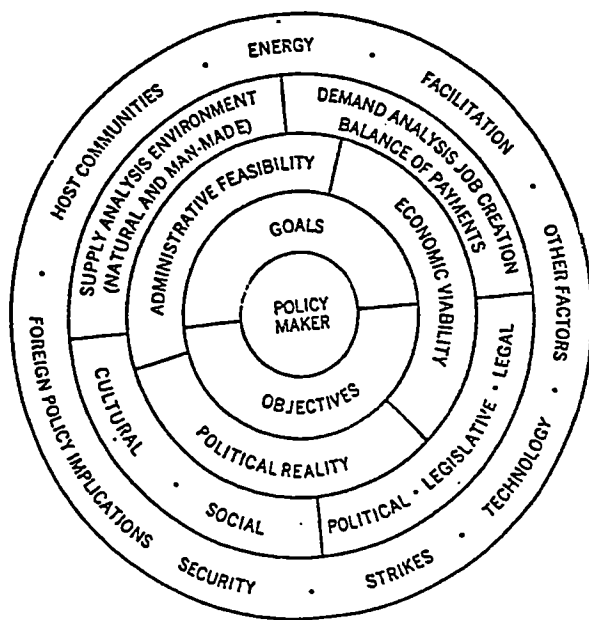


Figure 5.16 Impacts on Policymaker in the Decision-Making Process

Source: Edgell, D. L., 1990, p. 104

Another way of considering the decision-making process is via the use of an equation. Figure 5.17 presents an equation that contains another perspective as far as tourism policy decision-making is concerned.

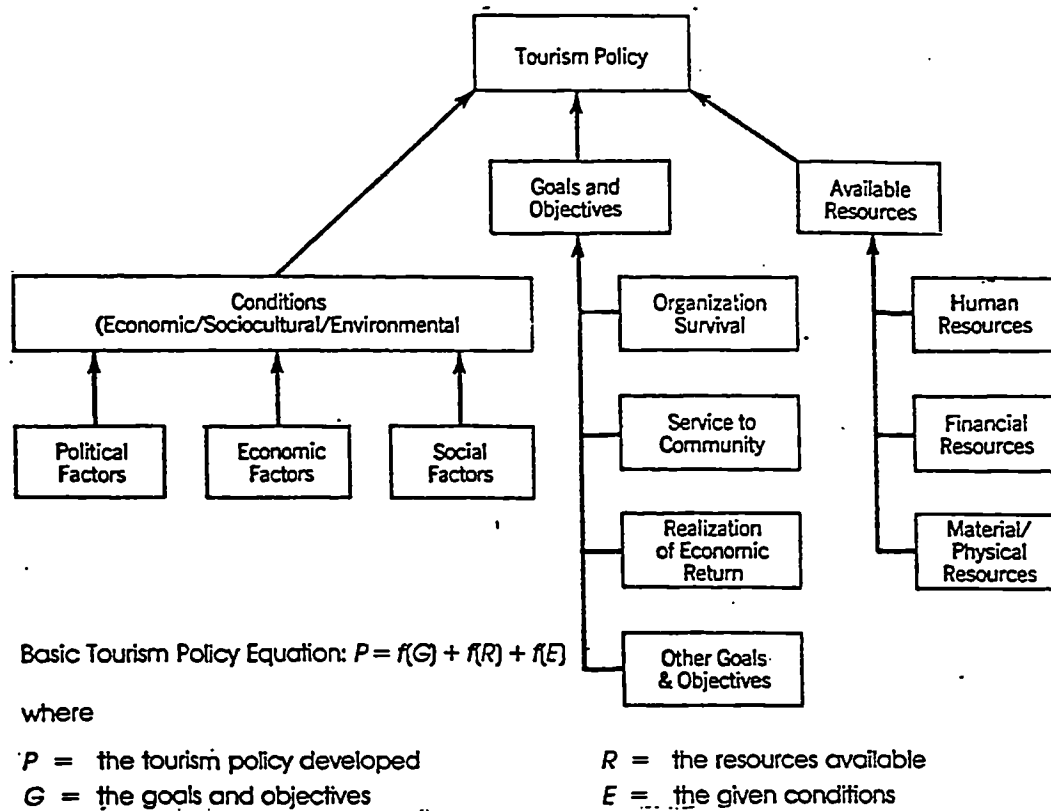


Figure 5.17 The Tourism Policy Development/Decision Process

Source: Edgell, D. L., 1990, p. 105

In addition Edgell (1990) shows in Figure 5.18 a description of the process based on observations and experience.

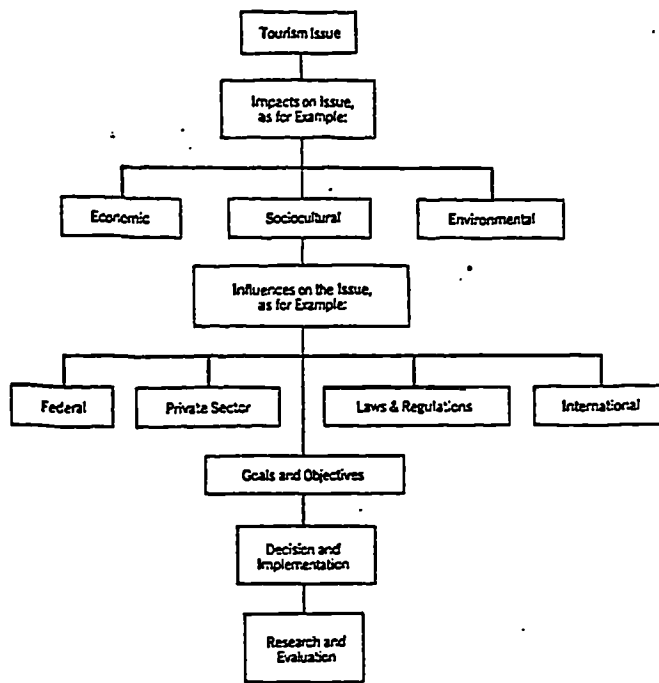


Figure 5.18 International Tourism Policy Foundation: General Diagram

Source: Edgell, D. L., 1990, p. 106

To quote Edgell (1990,p.105): ‘This general approach looks at each tourism issue separately. It suggests that tourism issues reflect not only economic considerations but sociocultural and environmental concerns as well, and it points out some of the principal influences on the decision process ...’

On the other hand, according to Edgell (1987) there is a need for stating goals and objectives and within these frames, the making of the decision at stake. Moreover, it is required to develop programmes to implement the decision and consequent evaluation through the use of research in order to assess the effectiveness of the decision. Edgell (1987, p.32) concludes: ‘The tourism policy decision-making process must be guided by carefully planned policies, international in concept and interdisciplinary in its approach and application. It should be developed based not only on economic benefits, but on the ideals and principles of human welfare and the quality of life. The decision maker in tourism must utilize policies which bring economic, sociocultural, and environmental forces together to work for their mutual interests.’

5.9.2 Cooper Strategic Perspective

Cooper (1997) argues that the increased growth of tourism demand, joined to the changing nature of the tourism consumer provokes pressure upon destinations. As a consequence and to quote Cooper (1997, p.3): 'Effective marketing and management of tourism destinations will therefore be critical in the future if tourism is to become a mature and acceptable sector. Indeed, it is also essential for the maintenance of a profitable and sustainable tourism sector at any particular destination. In this respect, concern for sustainability is central to the management of both markets and the destination'.

According to the same author (1997) the acceptance of sustainability has been proved by a new approach away from the short term towards the long term which contributed to the adoption of a strategic approach to the management of both markets and destination areas. The same author (1997) advocates that there is a synergy between the adoption of sustainable tourism guidelines and the longer-term point of view provided by the strategic planning of destinations and markets. Sustainability and strategic perspective are complementary and produce an organising framework which takes into account 'the marketing of not only tourism products but particularly destinations'. In the same study (1997) the author aims to investigate strategic formulae and the destination life cycle in the marketing of destinations. As Cooper (1997, p.3) puts it: 'The marketing of destinations is a relatively new departure for many localities, particularly at the regional and local level. At these levels the lead agency tends to be the public sector and this in turn, has a number of implications for the marketing process. For example, the public sector often is not able to sell products, rather it relies on overall promotion of a destination to 'pull' consumers to points of sale provided by the private sector. In addition, the public sector has to be even handed in its support of tourism enterprises and cannot be seen to be partial by backing 'winners'. Finally, the critical issue of resources is a constant problem for public sector marketing budgets, especially for activities which may be perceived as dispensable - such as market research'.

After noting the continuing debate about the life cycle as an analytical tool for the marketing of destinations, Cooper (1997) suggests that the integration of the long-term perspective offered by the life cycle with the concept of strategic market

planning, enables to devise marketing strategies for destination areas at various stages of the life cycle. As Cooper (1997, p.4) points out 'In other words, by careful management, sustainable tourism can be achieved at each stage of the cycle'. In addition sustainability demands a strategic planning approach which takes into account all variables at a destination - holistic perspective. Kotler (quoted in Cooper, 1997, p.4) gives a useful definition of strategic planning as 'The managerial process of developing and maintaining a strategic fit between the organisation's goals and capabilities and its changing marketing opportunities'. Cooper (1997) summarises the defining characteristics of the strategic planning approach as follows:

- a long term perspective;
- an holistic and integrated plan controlling the process of change via formation of goals;
- a decision process taking into account the resources mobilizing the destination to a future course of action.

Cooper (1997) states that in terms of the adoption of sustainable tourism principle the advantages of the strategic approach are evident. To quote the same author (1997, pp.4-5): 'The process of goal setting provides a common sense of ownership and direction for the myriad stake-holders, whilst at the same time sharpening the guiding objectives of the destination. The coherence provided by the approach provides a framework for joint initiatives between the commercial and public sector and demands the clear identification of roles and responsibilities. Finally, the approach delivers a range of performance indicators against which the destination's performance can be judged. In other words, strategic planning offers an integrated approach to the management of the destinations and provides a sense of ownership for the stakeholders'.

However, Cooper (1997) comments that the adoption of a long run strategic planning in tourism destinations is not easy. Destinations 'are comprised of a constantly shifting mosaic of stake-holders and value systems'. Moreover, the relevance of political process should be taken into account. To quote Cooper (1997, p.5): 'Politics influences who is responsible for the market planning process and lack of political

support commonly leads to the failure, or non-implementation, of plans'. Furthermore, Cooper (1997) notes that the tourism sector is dominated by fragmentation, small businesses and seasonality. As a consequence there is a lack of management expertise, a conflict of aims between public sector and private sector, short termism planning and tactical operating perspectives of small firms. In addition as Cooper (1997, p.5) contends: 'The stage of the destination in the life cycle also influences the acceptability of a destination-wide marketing exercise. In the early stages of the life cycle for example, success often obscures the long term view, whilst in the latter stages, particularly when a destination is in decline, opposition to long term planning exercises may be rationalised on the basis of cost. Also, the performance indicators adopted in such exercises can be controversial, as tourist volume is the traditional, and politically acceptable, measure of success in many destinations. From the point of view of sustainability such measures are more likely to be less tangible ones of environmental and social impacts. In other words, the tourism industry is often reluctant to make the trade off between present and future needs when success is judged by short-term profitability and volume growth'.

On the other hand amongst the number of approaches to strategic planning available to a destination Cooper (1997) points out the 'rational model' or 'planning school' as the elected. Here the strategic planning process can be considered as a series of iterative stages. The order of the stages can vary due to different objectives but standard stages are a common sense in the literature (Middleton 1988; Witt et. al., 1991) and can be indicated and summarised as follows:

1. situation analysis/environmental scanning;
2. objectives and goals;
3. strategy formulation (e.g. Porter's competitive strategic approach);
4. marketing, positioning and mix;
5. implementation and monitoring .

Cooper (1997) states that there is a debate about the effectiveness of utilising a life cycle framework for the marketing action of a destination area but the same author (1997) advocates that the approach adopted for destination marketing will be dependent on the destination's stage on the life cycle. To quote Cooper (1997, p.8):

'In particular the destination's point in the evolution of its development, combined with its competitive position will determine the strategic options available'. Jain (quoted in Cooper, 1997, p.8) has developed a matrix which summarises the main dimensions of the life cycle analysis - an evolutionary view of life cycle stages from embryonic to ageing, and a competitive position ranging from dominant to weak (Table 5.1).

COMPETITIVE POSITION	STAGES OF INDUSTRY MATURITY			
	EMBRYONIC	GROWTH	MATURE	AGING
Dominant	Fast grow Start-up	Fast grow Align cost leadership Renew Defend position	Defend position Align cost leadership Renew Fast grow	Defend position Focus Renew Grow with industry
Strong	Start-up Differentiate Fast grow	Fast grow Catch-up Align cost leadership Differentiate	Align cost leadership Renew, focus Differentiate Grow with industry	Find niche Hold niche Hang-in Grow with industry Harvest
Favourable	Start-up Differentiate Focus Fast Grow	Differentiate, focus Catch-up Grow with industry	Harvest hang-in Find niche, hold niche Renew, turnaround Differentiate, focus Grow with industry	Retrench Turnaround
Tenable	Start-up Grow with industry Focus	Harvest, catch-up Hold niche, hang-in Find niche Turnaround Focus Grow with industry	Harvest Turnaround Find niche Retrench	Divest Retrench
Weak	Find niche Catch-up Grow with industry	Turnaround Retrench	Withdraw Divest	Withdraw

Table 5.1 Jain's (1985) Guide to Strategic Thrust Options

Source: Used by Cooper, C., 1997

	Introduction	Growth	Maturity	Decline
Characteristics				
SALE	Low	Fast growth	Slow growth	Decline
PROFITS	Negligible	Peak levels	Declining	Low or zero
CASHFLOW	Negative	Moderate	High	Low
CUSTOMERS	Innovative	Mass market	Mass market	Laggards
COMPETITORS	Few	Growing	Many rivals	Declining number
Responses				
STRATEGIC FOCUS	Expand market	Market penetration	Defend share	Productivity
MARKETING EXPENDITURES	High	High (declining %)	Falling	Low
MARKETING EMPHASIS	Product awareness	Brand preference	Brand loyalty	Selective
DISTRIBUTION	Patchy	Intensive	Intensive	Selective
PRICE	High	Lower	Lowest	Rising
PRODUCT	Basic/unstandardised	Improved/standardised	Differentiated	Rationalised

Table 5.2 Characteristics of Destination Life Cycle Stage and Typical Responses

Source: Doyle, 1976; Kotler, 1986, used by Cooper, C., 1997

In the matrix adequate marketing strategies can be seen to be dependent on both a destination's stage and its competitive position.

On the other hand whilst many destinations may have awareness, intuitively, about their place within the life cycle, this is difficult to quantify. Cooper (1997) suggests growth indicators namely:

- volume growth;
- ratio between repeat to first-time visitors;
- length of stay;
- visitor profiles;
- expenditure per capita;
- visit arrangement (package /independent).

To quote Cooper (1997, p.9): 'Quite simply, at each stage of the life cycle the mix of evolutionary and competitive forces differs and thus, strategies to deliver a sustainable tourism industry at the destination should be distinctive at each life cycle stage'.

Strategic Options

Cooper (1997) considers that adopting Jain's (1985) approach to life cycle analysis and combining it with Butler's model of life cycle phases it is possible to find the strategic options adequate for destinations (Tables 5.1 and 5.2) and to outline the destination's features and possible answers to be taken. Following Cooper (1997, pp.9-14) by taking into account each stage for a destination the following descriptions of life cycle stages and strategic responses can be summarised as follows:

1 Exploration and Involvement

The destination is visited by few tourists or explorers 'who tend to shun' institutionalized travel. Volumes are conditioned by lack of access and facilities. The resort remains yet unchanged by tourism and there is high contact with local people. At the involvement stage, local communities have to decide if tourism is or not a development option and of the type and scale of tourism they adopt. Community initiatives will start to provide for visitors and advertise the resort 'which may lead to

an increased and regular volume of visitors'. There is the emergence of a tourist season and market and 'unforeseen pressures may be placed on the public sector to provide infrastructure and institute controls'. At this point it is necessary to build adequate organisation and decision-making processes for tourism to involve the local community 'to ensure that locally-determined capacity limits are adhered' to and that sustainable guidelines are applied in these stages. A number of Spanish local authorities opting for rural tourism are examples of these stages of the life cycle. Communities opting for tourism will find that at these stages growth of tourism is small and slow. This may be because there are difficulties in accessing distribution channels, or a shortage of accommodation. On the other hand, gaining awareness in the market place takes time and the market may be scarce by access, price or tradition.

An involvement stage is necessary to promote the products and access distribution channels in order to build a strong market position before competitors enter. There are three main possibilities here:

- *market penetration* : attracting more visitors from its existing markets without changing the product;
- *market development*: looking for new markets;
- *product development*: increased visitors via new products or improved products.

2. Development

Here, there are a large number of visitors and 'the organisation of tourism may change as control passes out of local hands and companies from outside the area (often national or multi-national) move in to provide products and facilities'. These businesses may have varied objectives and time scales in relation to the local community and its residents in terms of a sustainable development options and policy. It is at this stage that problem and conflicts can arise if local decision taking structures are not strong. 'Control in the public sector can also be affected as regional and national planning may become necessary in part to ameliorate problems', but also to market to generating areas, due to visitors becoming more dependent from travel bookings via the trade. This stage is critical, as these facilities, and the changing type

of tourism can modify the nature of the destination area and quality may worsen due to problems of over-use and deterioration of facilities. Examples of this stage are several destinations in the Canary Islands.

In the development stage focus changes to the management of market expansion matching adequate market segments to particular products and destinations to achieve a sustainable destination. It is convenient to take into account:

- diversifying distribution channels;
- keep quality of the products;
- continue promotion to keep awareness high 'but also switch resources to bring about product conviction and purchase';
- add new facilities.

This can be done by developing computer reservations systems and strategic alliances of destinations/resorts.

3. Consolidation and Stagnation

Here the rate of increase of tourists declines 'though total numbers are still increasing'. Moreover the destination area is now 'a fully-fledged part' of the tourism sector with 'an identifiable recreational business district'. At stagnation, peak tourist volumes have been achieved with a large number of repeat visitors. There is extensive use of facilities with a need for promotion in order to maintain the number of visits. Quite often there are environmental, social and economic problems at this stage. Examples are several Spanish coastal resorts. At this stage, it is important to defend market share against competition 'as does maintaining margins and cash flow by cost control and avoiding price wars'. Moreover at this stage a good strategy is to:

- test the market with new segments and to consolidate usual visitors;
- improve product quality;
- modify elements of the marketing mix.

Insofar when the number of tourists stabilize, 'management should not await decline as inevitable' but should to revitalise visits, looking for new markets, repositioning the destination, and give rises to improvements, or looking at new uses for facilities.

4. Decline

At this stage visitors are being lost to newer resorts and 'a smaller geographical catchment for day trips and weekend visits is common'.

Goodall, (quoted in Cooper, 1997, p.12) notes that the destination life cycle ends in one of the three ways:

- acceptance of failure and therefore retrenchment;
- survival with adaptation to the changing market circumstances;
- role change with an economic option outside of tourism.

As a consequence, in the first two scenarios, destination managers recognise the decline stage and the decision-making is to 'rejuvenate' or 're-launch' the destination by looking at new markets or developing the product. In this context it is usual for the involvement of the public sector as the trigger in terms of developing new products such as the development of a casino or redeveloping existing attractions. In addition the public sector can support via the regulatory process to achieve high quality developments. On the other hand the private sector can support the rejuvenation of resorts and through the seeking out of new markets and the adequate products matching these markets. The development of 'shortbreaks' is a useful example. These interventions may help to stabilise visitation, to fight seasonality and to diminish dependence on declining market segments.

However, strategies to match the decline stage are much more hard when managers are dealing with 'the built fabric of tourism destinations' rather than with a consumer product. Here, the long-run perspective on the scale of the life cycle can offer managers with a historical point of view and 'prompt a new scale of strategic thinking'- which can take into account the option of giving up the tourism industry completely. Finally, an emphasis should be given of the differing stakeholders and

their frameworks and the involvement of both stakeholders and the public sector decision-making as relevant beacons for strategic options. If tourism is to adapt both sustainable principles and practices the longer-term frame must be used and the sector must relinquish its traditional short run, tactical approach.

5.9.3. Verbeke Approach

Verbeke (1994) contends that despite tourism being the most important growth industry there are some issues as regards the future stages in the growth model to the extent that 'business as usual' management should be replaced by 'crisis management'. In effect there are indicators that the tourism life-cycle 'is facing a stage of recycling and resourcing anew' and anticipating a crisis has, as a consequence to develop strategies to manage these challenges. Verbeke (1994) assumes that there are two mega-trends affecting the future of tourism development: the growing concern for the environment and the growing demand for quality products. Both issues require a strategic response from the trade. To quote Verbeke (1994, p.4): 'Developing strategies to balance the environmental impact and corporate benefits has a high priority on the crisis management agenda. An ecological portfolio is presented as a framework for eco-management in the tourism enterprise'. As a consequence, improving expertise in resource management in eco-tourism and in new product market mix provokes the advantages of 'green credentials'.

On the other hand as Verbeke (1994, p.4) notes: 'Strategic answers to the increasing demand for high quality tourism is sought in strategic alliances between tourist enterprises. Two types of alliances are presented;

Aggregation of place bound tourism products can result in an added value of the tourist experience on site. A second option lies in strategic alliances between tourist enterprises based on the sequential aggregation of tourist products, as a strategy to obtain an added value to the total tourist product.'

Moreover the introduction of quality circles as a management concept is put at stake in the search for 'an integrated quality policy' in the tourism field.

I. Tourism Life-Cycle: A Reference Framework

1. *From development to maturity*

The main forces framing the growth model of tourism on the last decade were economic growth, paid holidays, cheaper oil prices, introduction of charter flights and computer technology (Poon1993; Verbeke1994). This scenario is the basis for a 'business as usual' management. 'Tourism policies are based on growth expectations and the tourism industry manages a familiar set of certainties. There was a firm belief in global peace, in political stability and technological progress, all of which are essential for tourism to reach a stage of maturity' (Verbeke, 1994, p.5). However unemployment, recession, war, crime, and terrorism has to be taken into account, and a breaking point should be anticipated (Verbeke 1994).

2. *Reaching a Stage of Crisis?*

Following Verbeke (1994) the factors, which are or might cause a breaking point in the growth curve, are:

- airline deregulation;
- overcrowding of tourist destinations and consequent negative perceptions;
- perceptions of insecurity;
- resistance to commercialisation of cultural heritage and revival of regional and ethnic identity;
- growing awareness that tourism can destroy the resources.

As Verbeke (1994, p.7) notes 'In this critical stage of tourism development, tourism management demands great flexibility; managing economies of scale, concentration processes, mass marketing, hotel and holiday branding and fierce competition all along the line of tourist products'. Furthermore, Verbeke (1994) stresses that there is 'an attack on tourism' and anticipating the consequences constitutes a huge challenge. Moreover the differentiation in demand and with a shift away from 'sun, sea, sand, and sex' holidays towards another type emphasising 'security, sight-seeing, shopping, snobbism and safe sex'. In addition (Verbeke, 1994) notes a negative attitude regarding

overcrowding is becoming more relevant. As a consequence assuming a stage of crisis in the development model of tourism is due to 'an interpretation of social processes in the external context of the tourist enterprise which will affect the future of tourism in one way or another' (Verbeke, 1994, p.9).

Moreover the same author (1994) states that other variables should be taken into account:

- the growth of unemployment in the OECD countries (estimation for 1994:37 million unemployed), nowadays the main generators of tourists;
- social exclusion of tourism and the image of tourism being elitist;
- tension between coloured people and whites, between guest and hosts, immigrants and natives;
- the perception of tourism as a form of neo-colonialism;
- the rise of religious fundamentalism.

To quote Verbeke (1994, p.9): 'Introducing the notion of a 'stage of crisis' in the tourism life cycle is not doom mongering but rather a call for critical reflection and strategic answers to managing a future with more than a usual number of uncertainties and risks'.

3. *The Stage of Recycling and 'Resourcing Anew'*

Verbeke (1994) argues that the traditional tourist life cycle model has been underestimated and misinterpreted. In addition there is little consensus about growth; this can be the number of tourists, nights spent, expenditure or the Tourist Opportunity Spectrum (TOS).

4. *Tourist area Life-Cycle*

Following Verbeke (1994, p.11): 'Introducing the Tourist Opportunity Spectrum (TOS) as a parameter of growth has the advantage of indicating the impact of the tourist activity in the area. There is, for instance, a strong relationship between the TOS level of development and the investment propensity in a tourist resort. As a rule the interest of investors is particularly

high in the stage of exploration and development of a tourist resort and decreases when critical signs of saturation are registered. The TOS as an indicator of the level of tourist activity also has the advantage of being closely linked with the carrying capacity of the area'. In addition, Verbeke (1994) notes that the first step regarding crisis management requires the consensus of all parties between the maximum capacity and the optimal capacity.

II Agenda for Crisis Management Within Tourism

There are two mega-trends affecting tourism and requiring strategic answer (Verbeke,1994).

1. The growing concern for environment quality
2. The growing demand for quality products.

1. *Ecological-Portfolio:*

Framework for eco-management strategies

Relevance of ecological portfolio and eco-management with consequences for resources. To quote Verbeke (1994, p.17):

'The current debate on sustainable tourism seems to be in a state of deadlock. The objectives of eco-movements, being control and reduction of activities, are hardly compatible with the economic viability of the tourism industry which requires growth and expansion'. As a consequence there is a need for a structural solution with a link between eco-management strategies and quality management seeking corporate advantages.

2. *Quality Geared Management:*

Verbeke(1994, p.18) referring to the 'total quality of the tourist product' or the quality of the total tourist product means taking into account the 'cumulative quality perception of the tourist of each product element (goods and services) at each stage of the tourist experience and in different places.' As a consequence the tourist experience is relevant for quality management. This implies strategies for improving the tourist experience and strategic alliances between the suppliers of tourist products and services.

2.1 Strategic alliances in the tourism sector

According to Verbeke (1994) two different types of strategic alliances can be suggested; one based 'on the place-bound aggregation' of tourism products, one based 'on the time sequence of tourist products'.

In place-bound aggregation it is very important to consider the Tourist Opportunity Spectrum from a quantitative and qualitative point of view. The final advantage of a 'coherent spectrum of opportunities' is a good support for strategic alliances between the enterprises involved. Moreover such alliances give rises to added value of the core product, being the stay in a tourist site or area.

A sequential aggregation 'is based on the fact that tourist products are aggregated by the tourist' with a 'well defined time sequence.' To quote Verbeke (1994, p.22): 'The philosophy behind it is to offer the tourist a complete package with a quality brand: information, transport, accommodation, amusement, and access to sport facilities or cultural events, travel payment and insurance'. This is the case of American Express but can have a general usage. However this is not an easy task due to nature of tourist enterprise and to quote the same author (1994, p.22); 'In addition, there will be a definite competitive advantage for the suppliers of total products compared to the current system of disintegrated offers of different tourist products and services. However this view of strategic alliances, based on the sequential aggregation of tourist products and services, has major implications for the tourism sector which is at present characterised by a high degree of disintegration'.

2.2 *Quality circles*

Verbeke (1994) argues that the integrated quality policy for the tourist product the 'quality circles' could be reintroduced. As Verbeke (1994, p.25) observes: 'Quality circles in the tourism business focus on the quality of product aggregates, whether place-bound or not, based on

strategic alliances or other forms of collaboration, in order to ascertain an added value to the total tourist experience’.

As a conclusion (Verbeke 1994) contends that the application of both quality circles and strategic alliances in the tourism sector needs to be researched more deeply and this can be considered as an important entry on the agenda of crisis management. To quote Verbeke (1994, p.27): ‘When anticipating a stage in tourism development which will have to deal with the recycling of tourism and resourcing anew, these management instruments can prove to be useful in two ways:

Firstly as an incentive to define the concept of the ‘quality’ of tourist products from the point of view of tourist experience and, secondly to develop strategies by which the different tourist enterprises can anticipate the forthcoming challenges or crises ...An integrated quality management of tourist product has become more than an academic issue or a fashionable marketing slogan, it is the ultimate challenge for future management in tourism’.

5.9.4 King and Ap Tourism Policy- Making Process Model

I Introduction

Tourism has become both an agent of change and development option, in developed and developing countries. There is no other industry such tourism which is ‘so wide-ranging’ with relationships to so diverse and different types of other sectors (Edgell, 1990; Pearce 1992; Hall and Jenkins 1995; Elliot 1997; King and Ap, 1999), so ‘In order to plan for and provide rational order to such a diverse and dynamic industry, it is necessary to develop policies to assist the decision makers in this complex industry’ (Edgell, 1990, p.7). As tourism policy is a main agenda to the tourism sector, researchers such as (Hall and Jenkins 1995; Hall 1996; Elliot 1997; Mowforth and Munt 1998; King and Ap 1999) have emphasised the need for further investigation on tourism policy and the tourism policy-making process. To quote King and Ap (1999, p.240): ‘Although prescriptive and advocacy tourism policy models are important, tourism policy cannot be prescribed or advocated without an understanding of how tourism policy is actually formulated and implemented. Thus, description and

explanation of the tourism policy making-process should precede its prescription and advocacy’.

Hall (1996) presented the first descriptive model about the tourism policy-making process in tourism literature - ‘Elements in tourism policy- making process’ (See Figure 5.20), inspired in Easton’s policy process approach in terms of an input- output model of the political system (See Figure 5.19).

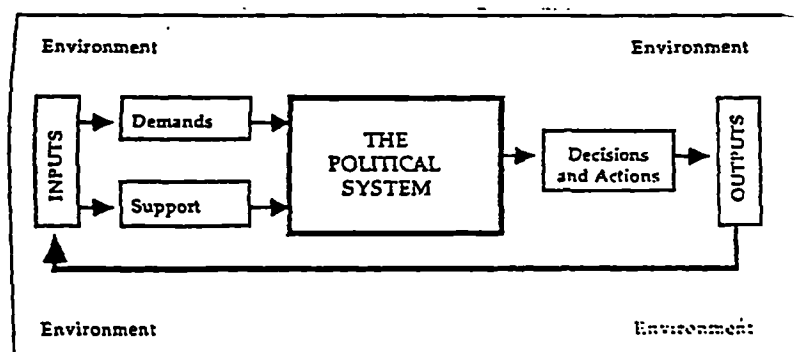


Figure 5.19 Easton’s Simplified Model of the Political System

Source: Quoted in Hall, M O., 1996, p. 50

According to Hall (1996) the four components of the policy-making process dealing with specific tourism policy issues are presented in Figure 5.20.

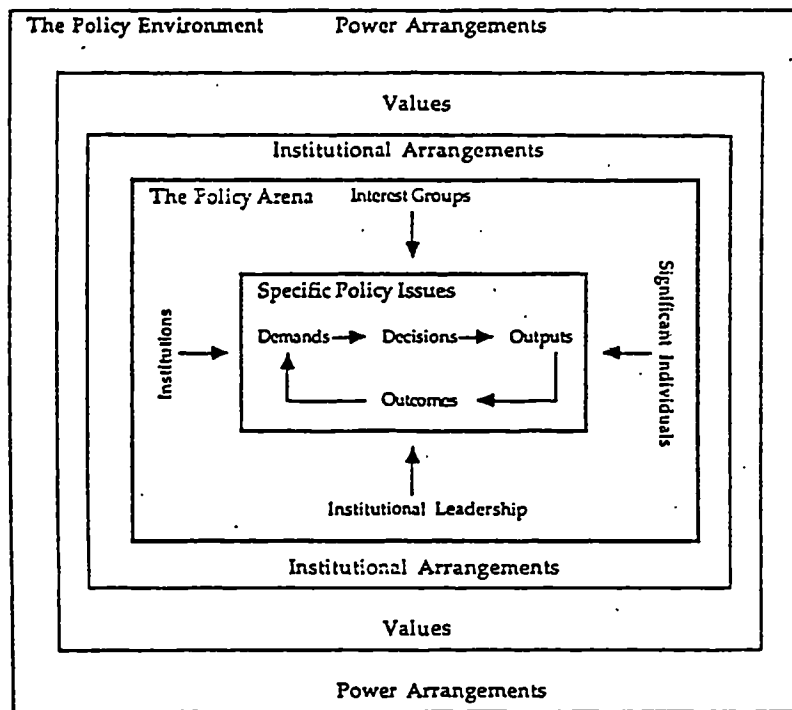


Figure 5.20 Elements in the Tourism Policy-Making Process

Source: Hall, C.M., 1996, p. 50

To quote Hall (1996, pp., 49-51):

‘Each particular policy development should also be set within the context of a policy arena in which interest groups (e.g. industry associations, conservation groups and community groups) institutions (e.g. government departments and agencies responsible for tourism), significant individuals (e.g. high profile industry representatives) and institutional leadership (e.g. Ministers responsible for the tourism portfolio and senior members of government departments) interact and compete in determining tourism policy choices. However, in highlighting the competing aspirations of the actors within the policy-making process one is also forced to recognise the existence of the broader environment within which policy making occurs and which includes institutional arrangements, values and power arrangements’.

However King and Ap (1999) note that previous studies, namely Airey (1983), Elliot (1997), Edgell (1990), William and Shaws (1991) have also observed that the

development of tourism public policy cannot be autonomous of (1) the socio-economic environment; (2) the political environment; (3) national development objectives and policy; and (4) the tourism environment. Moreover King and Ap (1999) emphasise that these frames are not taken into account in Hall's model. Furthermore King and Ap (1999) also state that policy arises from multiple factors, and no one factor can simply be the key for a true understanding of the policy-making process. Each factor influences and they can be seen as complementary. If tourism policy-making, they argue (1999), involves linking factors and delineating interrelationships, thus with Hall's model (1994) 'is that it does not address how factors such as power, institutions and values interrelate in determining tourism policy' (King and Ap, 1999, p.241). The same authors (1999) comment that no one in the tourism area will put the question of the importance of policy-making research, which can emphasise a better understanding of the political dimensions of tourism. However and to quote King and Ap (1999, p.241): 'But few in the policy study discipline really consider the value of choosing tourism as an area of public policy study, and this is the reason why it has been a neglected area of policy study'. In addition they suggest (1999) that the study of the tourism policy-making process can be generalised to the study of policy processes. This is a consequence of the holistic dimension of tourism and the need for co-ordination, negotiation and cooperation of many government departments (e.g. immigration, civil aviation, planning and development).

On the other hand King and Ap (1999) consider that the policy process is an important area of public policy research. It emphasises the factors influencing policy formulation and implementation at its multiple effects. As King and Ap (1999, p.241) put it: 'Strictly speaking, policy is shaped by the interaction and coalescence of multiple factors with each factor playing a role in the formation of policy, and these factors interrelate together to determine policy'. As a consequence the same authors (1999) argue that the 'interrelationships among the various policy factors' are a hard core part of the model that can provide a 'fuller understanding of the policy-making process'. This is because it 'covers and examines' the process of policy-making rather than 'simply identifying and describing' the various parts of the process. On the other hand and as King and Ap (1999, p. 242) point out: 'Acknowledging there are some problems in Hall's model and in other models of the policy-making process found in

the public policy literature, they do provide a basic framework for developing a more comprehensive model of the tourism policy-making process.’ As a consequence the purpose of the King and Ap (1999) study ‘is to develop and describe a comprehensive model of the tourism policy-making process’.

II The Tourism Policy-Making Process Systems Model

King and Ap (1999) proposed a new policy-making process model (See Figure 5.21). ‘The model attempts to describe and explains how tourism policy is shaped by a set of interrelated factors within the context of socio-economic and political environment. All factors affecting the tourism policy-making are regarded as inputs of the model. This model is principally built up on four fundamental concepts ... The concepts are (1) systems theory; (2) four dimensions of tourism policy formulation; (3) tourism policy input/ levels; (4) interrelationships of the various policy inputs’ (King and Ap, 1999, p.242). These four concepts can be summarised as follows:

1. *Systems Theory*

The tourism policy-making process can be considered as an input-output model of the political system derived from previous system theorists. Forces generated in the environment like problems, matters of concern and opportunities, which affect the political system, are seen as inputs. Demand for tourism policy arises when government officials, the tourism industry or other interest groups respond to environmental conditions and act to initiate and/or affect tourism policy. Moreover when demands arise in the political system, the political system processes and transforms these demands into tourism policy, which represents the output of the process. The impacts of tourism policy may on the other hand modify the environment and the demands, which in turn gives rise to a feedback influence.

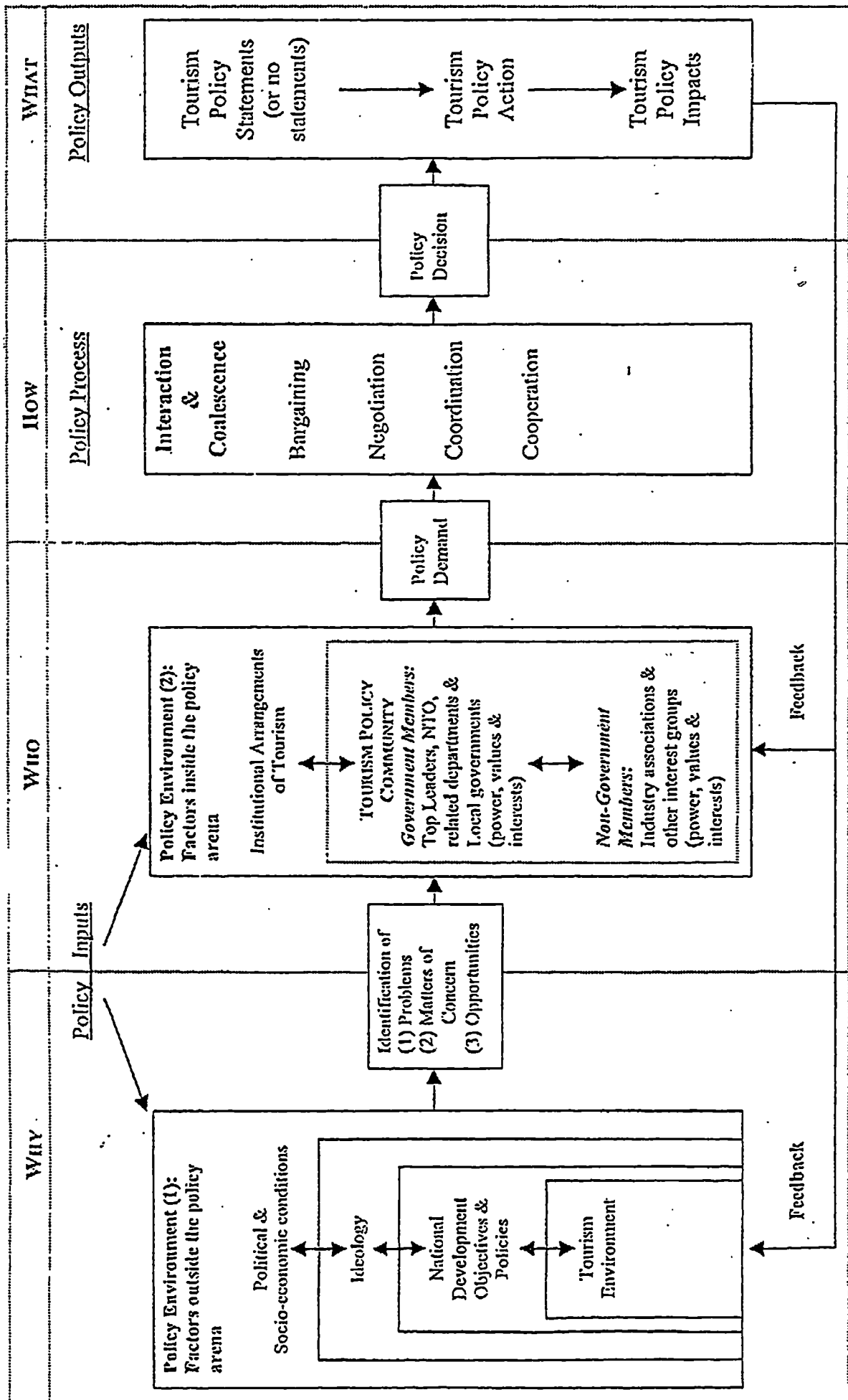


Figure 5.2.1 Tourism Policy Making Process Systems Model

Source: King C., & Ap, J., (1999) Development of a tourism policy making Process Model in Miller, J., (ed), Proceedings of Fourth Annual Graduate Education and Graduate Research Conference in Hospitality and Tourism, January 4-6, 1999

2. *The Four Dimensions of Tourism Policy Formulation*

Following the same authors (1999) tourism policy-making is a complex area and it involves people, environment, ideology, power and organisation. In effect King and Ap (1999) adapted and refined from Elliot's work 1997. They are (1) Why?-government rationale; (2) Who?-policy makers and participants; (3) How?-policy formulation and implementation; and (4) What?-outputs and outcomes of tourism policy. The King and Ap model is guided by these four dimensions. For more developments see Box 5.1.

	<i>Principles</i> What <i>should</i> be done? Ideal behaviour, theory, model	<i>Practice</i> What <i>is</i> done, practice not principles
	Principles: public interest, public service, effectiveness, efficiency, accountability	Actual behaviour
Why involved	Responsibility of government and PSM, moral, legal, professional principles Political culture, expectations Power of government Public objectives	Economic objectives Economic pressure Political objectives formal and informal Tourism has to be managed Need to respond to problems and demands
Who involved	Government and people Those affected by policy PSM Industry and interest groups	Policy makers, politicians, managers Power holders Industry Those affected
How involved	According to political culture, PSM principles PSM tourism norms Partnership with industry Formal process	Policy systems, formulation and implementation Power networks Management process Formal and informal
What results	Objectives, effectiveness Serve public interest and people Protect environment and community Efficiency	Success or failure Objectives achieved Impact Efficient, effective PSM

Box 5.1 **Public Sector Management and Tourism: Framework for Analysis**

Source: *Elliot, J., 1997, p.3*

3. *The Tourism Policy Inputs/Levels*

King and Ap (1999) outline that tourism policy factors vary from macro-level (e.g. socioeconomic environment, ideology) to meso or organisational level (e.g., formal and informal values, rules of tourism organisations) and to the micro levels (e.g., values, interests and power of the individual policy actors). The latter two levels are represented by the institutional arrangements and policy community factors, respectively which are included inside the policy arena (i.e., the box labelled 'General Environment 2' of the Model').

4. *The Interrelationships between the Tourism Policy Inputs*

Various tourism policy factors have a structure and are interrelated. The model points to 'a funnel of causality' where every input 'is nested within another'. The study and identification of interrelationships between policy inputs 'is one of the most difficult and challenging areas in the policy process because of the dynamic, complicated and organic nature of the policy factors and the absence of literature concerning this topic'(King and Ap, 1999, p.243). The same authors (1999) attempt to identify and delineate these interrelationships. They suggest two types of interrelationships interaction and coalescence. To quote King and Ap (1999, p.243): 'Coalescence and interaction of a set of interrelated factors, which are intertwined together, help determine tourism policy'. Such interactions may be 'bilateral' or 'multilateral'. In bilateral interaction change in the political and socioeconomic environments provokes change in the ideology. On the other hand ideology (communism and capitalism) influences political and socioeconomic development. With multi-lateral interaction, socioeconomic development can influence tourism development, tourism development will influence the role of tourism in the framework of national development objectives. Moreover, King and Ap (1999) note that multi-lateral interaction between policy factors are very usual in the policy-making process. To quote King and Ap (1999, p.243): 'Coalescence refers to tourism policy that is jointly shaped by many policy factors. Each factor has its own role and it is suggested that their roles can be examined by three elements (1) relative importance, e.g. the power and value of the top leaders are very important in the initiation and final decision of tourism policy; (2) dependence of one policy input on another, e.g.,

institutional arrangements have no particular content, their effects lie in the way which they interact with other policy inputs, and (3) relative stability, e.g. institutional arrangements and ideology are more stable than socio-economic conditions ...' The same authors(1999) contend that interaction and coalescence of all factors appear via bargaining, negotiation, co-ordination and co-operation between policy actors,(See Figure 5.21).

III *Tourism Policy Formulation And Implementation-Explanation Of The Process*

Inspired by the framework presented by Elliot (1997), there are four dimensions of the policy-making process according to - Why?, Who?, How?, and What?. This framework is a guideline to help explain the process which takes into account all the important inputs and components of the model (King and Ap, 1999). The same authors (1999) suggest the following explanation presented in a summarised version :

Why?-Government Rationale

Governments have responsibilities or principles to run a country. They provide the political stability and security, and raising the standard of living (Elliot1997). The political, economic and cultural values of tourism make it possible for governments to achieve these responsibilities. But the values of tourism government uses depend 'on the environment that the government confronts'. Moreover, environment is considered conditions or circumstances defined as outside the political system. In the model four environments are taken into account:

- (1a) Political conditions- political stability and international relations are parts of the political environment influencing tourism policy-making.
- (1b) Socioeconomic conditions- socioeconomic problems such as economic recession and balance of payment crisis will move governments to emphasise the economic importance of tourism as an option.
- (2) National development objectives and policies - a country's development policy in general, namely foreign investment policy, funding policy gives 'direction and guidelines' in the formulation of tourism policy. Tourism public policy development should be coordinated with national development objectives and policy.

- (3) Specific environment- the most relevant context for policy-making is the tourism environment. Examples in this area are problem of tourism impacts and air traffic, which may lead to government intervention.

To quote King and Ap (1999, p. 245): 'Changes in the three above-mentioned environments or conditions provide a base for change and the development of tourism policy, such as attracting government's attention to a set of problems, which need to be dealt with. Once a tourism problem has been defined as important, the environment alone cannot explain how the problem will be perceived, or what the policy response will be ... The environment is also influenced by ideology'.

- (4) Ideology - examples of ideology are communism socialism and capitalism. Ideology influences the range of tourism development and the support for it. It 'sets the style of tourism' and the dimensions of government involvement. To quote King and Ap (1999, p.245): 'To sum up, both environmental forces and ideology contribute to the formation of broad tourism policy goals and objectives. However, they do not explain how tourism policy is formulated and implemented'.

Who? Policy-makers and Participants

Following King and Ap (1999) tourism policy-makers and participants 'are a core element' of the tourism policy-making process. Tourism policies are formulated and implemented by them, transmitting 'problems and opportunities' in the environment, 'interpreting values', 'expressing their own organizational and personal interests', and 'exercising power'. Moreover the tourism policy-making process mobilises a huge amount of both public and private organisations. Elliot (1997) suggests the designation of 'tourism policy communities' for the tourism policy actors. To quote Elliot (1997, p.58): 'Various organisations from the public and private sectors make up the policy community and contribute towards the formulation of tourism policy. The extent of the involvement will vary according to whether it is a federal or unitary system of government, the power of the organisations and the policy area'.

- The tourism policy community players includes:
- political leaders;
- national tourism organisations;
- other government ministers and departments;
- local government;
- interest groups;

To quote Elliot (1997, p.71): ‘The actual policy making or the organisations proceed through a policy community. This includes the key organisations and actors who participate in policy and who are continually in touch with and talking about tourism issues ... some organizations will be involved in almost all issues while others will only participate if an issue is of interest to them’. The role of community as residents is not addressed specifically in King and Ap model.

How?-Policy Formulation and Implementation

The tourism policy-making process, is influenced by institutional arrangements, values and power. Moreover the tourism industry is fragmented and has conflicts of values and interests towards tourism development policy. The conflict of values, interests and power occurs in the tourism policy-making process at both government and industry levels. to quote King and Ap (1999, p.247) : ‘Power will unavoidably be exercised between policy participants pursuing different values and interests. If an individual or one group of policy participants holds dominant power, their values or interests will prevail. If no policy participant has dominant power, political bargaining and negotiation will occur to build up consensus. This may be very common at both government and industry level. The NTO must continuously communicate, co-ordinate, co-operate and bargain with other relevant ministries as well as industry associations about tourism policy objectives and resources commitment’.

What? Outputs and Outcomes of Tourism Policy

The outputs of the tourism policy community are policy statements and actions. Tourism policy statements represent tourism policy decisions, but King and Ap (1999) advert that sometimes there may be no statement. Sometimes there may be a

decision not to formulate a policy. This is popular in policy-making defining policy 'as whatever governments choose to do or not to do'- (Dye, quoted in Colebatch, p.101).

After the tourism policy decision is implemented it will cause impacts on the environment and policy demands and this takes into account the 'feedback' concept in the model.

To quote King and Ap (1999, p.248): 'In summary, the four dimensions that have been elaborated cover all the components identified in the policy-making process and conveniently provides a framework in examining how policy is formulated ... The model presented represents a first step to develop a fuller understanding of policy-making and the processes involved. It is acknowledged that current understanding of policy-making is limited and that it is a complex area for investigation. Nevertheless, the development of the tourism policy-making process systems model provides one means to help understand this important tourism topic. Further clarification and refinement of the model is needed especially in the context of empirical application'.

5.9.5 A Third Way Tourism Policy?

Giddens (1998) notes that since its inclusion in the Brundtland Commission report in 1987, sustainable development has become the main concern of environmental groups and politicians of most persuasions pay at least lip service to it. Brundtland provided a deceptively simple definition of sustainable development, as the capability of the current generation 'to ensure that it meets the needs of the present without compromising the ability of future generations to meet their own needs'(WCCD 1987, p.8; Giddens p.56). However, Giddens (1998) contends that sustainable development is basically a guiding principle rather than a well defined formula. Nevertheless, the same author (1998) stresses that UN put it in Agenda 21 a programme funded 'as a detailed follow-up to Brundtland's efforts'. Robson and Robson (1996) look at the potential for stakeholder management to be implemented by business organisations and focus the debate 'surrounding the ideology and practical implications of a stakeholder society'. Tony Blair, Prime Minister and Leader of the Labour Party in the United Kingdom in a speech at 'a Labour conference- Blackpool 1998' states: 'The challenge we face has to be met by us together. One nation. One community.

Social Justice; partnership; cooperation; the equal worth of all, the belief that the best route to individual advancement and happiness lies in a thriving society of other. Words and concepts derided in the 80's. These are values of today. Not just here but rounds the world. 'It's up to me' is being replaced by 'It's up to us'. The crude individualism of the 80's is the mood no longer. The spirit of the times is community' (p.7). In addition the same author (1998, p.8) emphasises: 'And in this new era, a new agenda. Economies that compete on knowledge, on the creative power of the many not the few. Societies based on inclusion not division. Countries that are internationalist not isolationist. This is the Third Way, our way of reconnecting people to political idealism in an age where political ideology is distrusted'.

On the other hand Robson and Robson (1996) state that stakeholder theory is a facilitator of corporate strategy and that as 'a perceived need to develop a more caring, sharing society', stakeholder theory should be taken 'seriously'. As a consequence, and to quote the same authors (1996, p.534): 'For tourism businesses, this essentially means that stakeholders need to be drawn in to the decision-making process. Stakeholders need to be identified, and relationships nurtured to ensure that analysis of concerns, goals, values and responsibilities are understood and synthesized into the strategic framework of the business'. The same authors (1996) argue that the world's largest service industry, tourism needs to find a substantive role for stakeholder management. In effect sustainable tourism is used to describe the type of future tourism development. This type of tourism 'has attracted a great deal of interest worldwide, although the method of its delivery has not been fully explored' (Robson and Robson , 1996, p.534), and stakeholder management can be a framework for delivering sustainable tourism development. Figure 5.22 illustrates the stakeholder groups for local government by tourism marketer. However, some issues emerge regarding the stakeholder concept. Robson and Robson (1996) note that each stakeholder 'other than end-users', will have its own group of stakeholders.

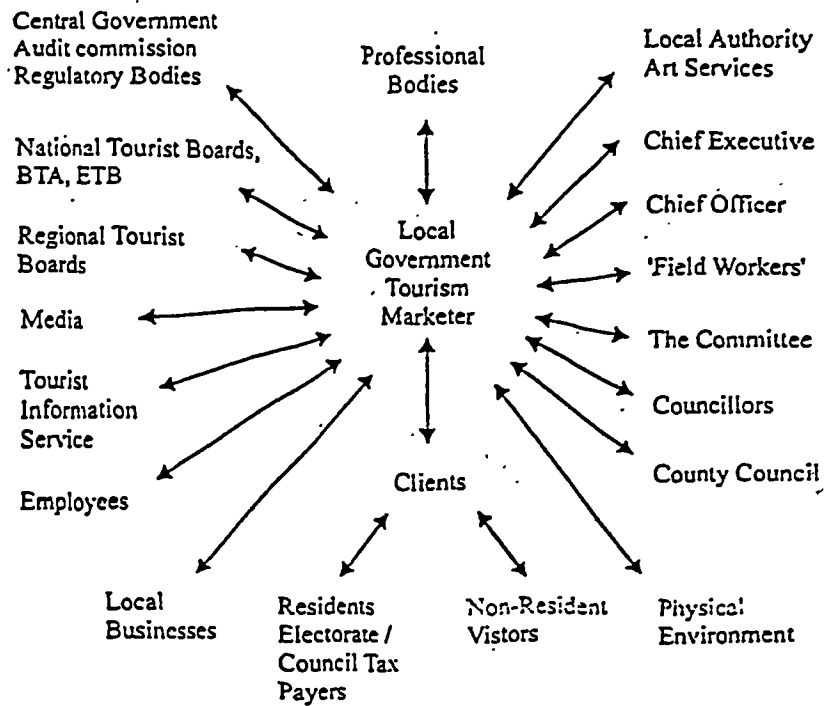


Figure 5.22 Stakeholder Groups for the Local Government Tourism Marketer
Source: Robson and Robson, 1996, p. 536

On the other hand Robson and Robson (1996) emphasise that the idea that tourism organisations should have an interest both in social responsibility and stakeholder management is normative. Moreover to quote the same authors (1996, p.537): 'Stakeholder management based on the concept of social responsibility has been found so far to have both the initial problem of identifying the stakeholders themselves, and the added problem ... of differing social roles stemming from different responses to, and rationalizations of, the challenge of social responsibility. This then begs the question of how success could be measured, since the various stakeholders have vastly different missions and value platforms'. In addition Baum's (1994) research, suggests that many NTOs are concerned with environmental impacts but not specifically mobilised to both sustainable tourism development or stakeholder management.

However Robson and Robson (1996, p.540) observe that 'the stakeholder concept implies the beginning of a new ethical paradigm, particularly for business'.

The stakeholder society is part of the third way. The third way represents the renewal of social democracy when the old left become obsolete and the ideas of the new right appear inadequate and contradictory.

- A new agenda is emerging (Giddens,1998).
- Is there a room for stakeholder tourism?
- Is there a room for third way tourism policy?

The chapter emphasised the importance of a tourism policy for dealing with the social impacts and consequences of tourism. In so doing this chapter took into account the point of view of residents as input for the development of a tourism policy. Next chapter will consider the methodology used for examining the attitudes of residents towards the social impacts and consequences of tourism and the resident's views for the development of a tourism policy.

CHAPTER SIX

THE METHODOLOGICAL APPROACH

6.1 Introduction

This chapter discusses the methodological approach used in this study of the attitudes of residents towards tourism, the factors that influence these attitudes and their views towards the development of tourism. The discussion put forth describes the objectives of the study and justifies use of the chosen methodology, which is mainly quantitative in nature. In addition, the chapter discusses the scaling technique and discussion of the variables included. The chapter also contains a section describing research procedures, which led to the sample selection and compilation of the final research instrument.

6.2 Objectives of the Study

The overall aim and objective of the research is:

1. To assess the attitude of residents of Madeira to tourism to the island;
2. To identify the factors that influence attitudes of residents; and
3. To explore the views about consequent tourism policy.

A survey was used to measure residents' attitudes towards tourism and collect information about variables, such as knowledge variables, demographic and behavioural ones. Specific research questions guide the research. The questions are:

1. What is the relationship between knowledge of tourism and attitudes towards tourism?
2. What is the relationship between demographic characteristics and the attitudes towards tourism?
3. What are the characteristics and patterns of attitudes towards tourism?
4. To what extent do attitudes towards tourism predict support for the development of tourism?
5. What is the relationship between demographic characteristics, knowledge of tourism and attitude variables on residents' behaviour towards the development of tourism?

6. To what extent do residents support and put pressure on Government to develop a tourism policy?

The overall goals of the study are:

- to quantify the attitudes of residents towards tourism; and
- to identify factors that can be used to examine residents' behaviour towards the development of tourism.

A survey instrument, questionnaire, was developed to collect the data required to answer the research questions and goals.

6.3 Research Design

According to Sekaran (1992, p.4) research is 'an organized, systematic, data based, critical scientific investigation into a specific problem'. The research approach chosen for this study incorporated both exploratory and descriptive designs, in order to build a broad understanding of the residents, while at the same time allowing for quantitative analysis. In effect, quantitative research is a form of conclusive research, involving large representative samples, with in large part structured data collection procedures. The decision chosen was in part due to the lack of abundant scientific preceding research in Madeira island and the need to achieve findings which could provide both a step forward and taken into account by future research. As a consequence, exploratory research, descriptive and causal ones, associated with quantitative methods attempted to measure aspects of residents' general behaviour, emerging in the field work and supported by the literature review.

According to Gilbert (1992) exploratory research is used to seek insights into a problem, the alternatives and variables which should be selected. On the other hand, descriptive research allows for a tentative relationship between variables. Moreover, and to quote Gilbert (1992, p.172): 'these relationships will describe the way behaviour occurs and can lead to the development of hypotheses which may lend itself to causal research'.

The final questionnaire, which was developed and refined from previous studies and previous research, is of particular relevance as it allows residents to express their views

and attitudes towards several items and variables, establishing both patterns and underlying structure of their responses.

Figure 6.1 presents a comparison of the characteristics between qualitative and quantitative paradigms.

Qualitative Paradigm	Quantitative Paradigm
1. Qualitative methods used	1. Quantitative methods used
2. Concerned with understanding human behaviour from the actor's frame of reference	2. Seeks the facts or causes of social phenomena without advocating subjective interpretation
3. Phenomenological approach	3. Logical-positivist approach
4. Uncontrolled, naturalistic, observational measurement	4. Obtrusive, controlled measurement
5. Subjective insider's perspective	5. Objective, outsiders perspective
6. Grounded, discovery-oriented, exploratory, expansionist, descriptive, inductive	6. Ungrounded, confirmatory, reductionist, inferential, hypothetico-deductive
7. Process-oriented	7. Outcome-oriented
8. Validity is critical	8. Reliability is critical
9. Holistic-attempts to synthesize	9. Particularistic-attempts to analyse

Figure 6.1 A Comparison of Qualitative and Quantitative Paradigms

Source: Adapted from Reichardt and Cook (1979) by Gilbert, D., 1992, pp 183

A quantitative paradigm is more linked to a positivist point of view. According to Clark, et. al., (1998) positivism is a philosophy where the only true is scientific in its features and the main objective is to describe the interrelationships between real and observable phenomena (social and physical). The qualitative paradigm is more concerned with interpretative research and the main assumptions are:

- human behaviour are the product of human action without a fixed nature;
- human action and behaviour is influenced by meanings;
- the researcher should interpret such meanings and human actions are not value-neutral in both content and motivation (Clark et. al.,1998).

The same authors (1998, p.18)) after discussing positivist *versus* interpretivist approaches conclude: ‘The differences between positivist and interpretive research are not just a matter of scale in terms of the numbers of subjects than can be studied, but also a matter of equal propensity of each for error. All research activity involves acts of faith and requires a critical acceptance of the potential for fallibility’.

According to Gilbert (1992) research falls within a continuum between the two paradigmatic extremes. This main survey takes into consideration the previous two approaches but focuses on the quantitative framework, attempting to be:

- systematic;
- structured;
- descriptive and exploratory;
- hypotheses testing;
- accurate.

6.4 The Broad Methodological Approach

6.4.1 Literature Review

The literature is the documentation of a comprehensive review of published and unpublished work from secondary data sources in the area of specific interest. According to Dawes (1998) a good literature surveys ensures:

- important variables are not omitted;
- clearer idea of which variables are most relevant;
- development of an appropriate theoretical framework;
- problem statement can be built with better clarity and precision.

The literature of this study summarises the existing body of knowledge in the field, which the present research was built upon. The literature review includes:

1. Background to Madeira;
2. Impacts and tourism;
3. Attitudes and tourism;

4. Policy and tourism.

Moreover the review of literature discusses a number of disciplines such as economics, sociology, geography, social psychology, anthropology and politics. The tourism literature reviewed for this study was largely concerned with tourism development issues from sociological, psychological, political and philosophical perspectives. This literature sought to provide information on the impacts of tourism on residents, responses to tourism and views about tourism policy. Despite the studies related to the broad issue of tourism few examined the reasons why residents support tourism from a holistic point of view.

In addition to the general literature review, other secondary data were required as background information to the study. Secondary data described economic, social and tourism development aspects about Madeira. Journals, magazines, books, reports, conference proceedings, Master and PhD theses, newspapers and online databases, Government publications, provided this information.

6.4.2 Revision of Research Problem and Formulation of Research Objectives

The final set of research objectives was reviewed and refined after a review of the literature.

The present research was designed to assess the relationship between resident's attitudes towards the social impacts and consequences of tourism and the development of tourism. More specifically, the study was designed to:

1. Assess the attitudes of residents towards tourists, tourism, economic impacts and future actions related to tourism;
2. Identify the extent of positive and negative attitudes of residents towards tourists, tourism, economic impact of tourism and future actions related to tourism;
3. Identify the relationship between attitudes and support for development tourism policy.

However, the empirical evidence suggested a better definition of the research question. It is:

- What is the relationship, between knowledge, attitudes and demographics of residents and their behaviour towards the development of tourism?

Tourism provokes impacts. Residents have attitudes towards tourism impacts. Government has a response to those impacts and residents behave (respond), to the response of government. As a consequence:

- The objective of this research is to assess the attitudes of residents of Madeira to tourism to the island and to explore the views about consequent tourism policy. As a consequence the research was conducted to establish whether or not the residents of Madeira have common patterns of attitudes towards tourism. The following specific objectives were defined:

1. Assess the attitudes of residents towards tourists, tourism, economic impacts of tourism and future actions related to tourism;
2. Investigate the attitudes of residents towards impacts and consequences of tourism according to their knowledge about the importance of tourism;
3. Assess the attitudes of residents towards impacts and consequences of tourism according to their socio-economic and demographic characteristics;
4. Identify the relationship between attitudes and support for development tourism policy.

On the other hand the following research questions were investigated with the goal of finding an answer or solution:

- Are there any underlying dimensions regarding residents' attitudes towards the impacts and consequences of tourism?
- Do the residents of Madeira have the same patterns of attitudes regarding the social impacts and consequences of tourism?
- Is it possible to determine residents' attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism?
- Is it possible to determine residents' attitudes towards tourism impacts and its consequences according to their socio-economic and demographic characteristics?

- Is it possible to determine residents' support for the development of tourism policy according to their knowledge about tourism, their attitudes towards tourism and their socio-economic and demographic characteristics?

6.4.3 Defining Theories, Concepts and Variables

The research used hypotheses development and a theoretical framework was required and identified through literature survey, in order to help in the directions hypothesised.

The geographic fact of Madeira being an island, open and exposed to the world, and on the other hand, the fact that for centuries of living together, has forged its own social *ethos*, mixed with a spirit of initiative, altruism and solidarity. Madeira is defined by community rather than individualism and hierarchy.

This main survey assesses the responses of residents of Madeira with regard to social impacts and consequences of tourism development. The responses are to be assessed through the measurement of attitudes. In addition residents' attitudes towards the implementation of tourism policy by the government are studied and residents' profiles are developed from tourism knowledge and demographic variables.

The research focuses on the concept of attitudes. Attitudes were explored by operative and theoretical approaches and by cross-disciplinary studies. This led to the selection of three theories, which seem to support a more communitarian approach regarding attitudes. The three theories are:

- altruistic surplus;
- gift relationship;
- new Darwinian co-operation theory

6.4.4 Theories

6.4.4.1 Altruistic Surplus Theory and Tourism

Faulkner and Tidewell (1997) presented a framework, which has been used for a comparative study of the social impacts of tourism in destination communities along the

seaboard of Australia. The framework is tested in a case study dealing with seaside resorts. They contend that the survey of resident behaviour emphasised some relationships between variations in perceptions of tourism's impacts and variables such as involvement in tourism, residential proximity to tourist activity and period of residence. However, they note that the most relevant feature of resident reactions, is the generally positive view of tourism's role in the region. As a consequence, they concluded that the altruistic surplus phenomenon observed in urban planning might apply to tourism. To quote Faulkner and Tidewell (1997, p.26): 'The positive view of tourism among Gold Coast residents overall, and the marginal variation in opinion irrespective of such background variables as period of residence, place of residence and involvement, suggests that, contrary to Doxey's model's prediction relating to changes in the pattern of resident reactions over time, some communities adapt to tourism and therefore develop a resilience which enables impacts to be accommodated'. As a methodological approach the authors (1997), used face-to-face interviews. After pre-testing the instrument, a pilot study of 50 households was carried out in order for both further testing and refining the instrument and training of interviewers. In addition, 400 interviews were obtained.

Faulkner and Tidewell research, within the framework of the altruistic surplus theory, can be useful for the interpretation of attitudes of residents of Madeira to tourism and its role as a development tool for the island.

In the tourism context and with the support of altruistic surplus theory it is suggested that residents of Madeira may tolerate downside effects of tourism they might experience in personal terms, because their altruistic attitudes incorporate the broader island-wide benefits of the tourism sector. This hypothesised and explorative theory, deriving from the literature review on the impacts and attitudes, will search empirical support in the chapter on findings.

6.4.4.2 Introduction to a Methodological Theory on Attitudes

a) *Anastasi and Urbina Highlights*

Anastasi and Urbina (1997), state that an attitude is usually defined as a tendency to behave favourably or unfavourably toward a class of stimuli, such as a national or ethnic group, a custom, or an institution. Moreover, and to quote the same

authors (1997, p. 405): 'It is evident that, when so defined, attitudes cannot be directly observed but must be inferred from overt behaviour, both verbal and non-verbal. In more objective terms, the concept of attitude may be said to connote response consistency with regard to certain categories of stimuli. In actual practice, the term 'attitude' has been most frequently associated with social stimuli and with emotionally toned responses. It also often involves value judgements.' In addition, the same authors (1997), contend that despite opinion being differentiated from attitude, the two terms, often, are used interchangeably and as regarding as to assessment methodology, opinion surveys are distinguished from attitude scales.

a) *The Gift Relationship*

Richard Titmuss's *The Gift Relationship* was first published in 1970. The book, despite being a comparative study of blood donation in the UK and the USA, seeks to argue about the more general issue of the place of altruism in human affairs. In effect, the book's central argument that altruism is both 'morally sound' and 'economically efficient' provoked a huge impact. Titmuss considered that altruism is essential to a healthy society and examining inequalities in health and welfare from the approach of human values, the author concludes that since altruism creates social cohesion and social wealth, a system of voluntary blood-giving is safer and more economically efficient than one based on payment of donors. The following attributes, on a summarised version, were indicated by Titmuss (1997, pp. 127-128) in defence of altruism:

- the gift of blood takes place in impersonal situations;
- the recipient is in almost all the cases not personally known to the donor;
- only certain groups in the population are allowed to give- the selection is made by external arbiters;
- there are no penalties for not giving;
- for the giver, there is no gift in return;
- no givers will or wish for corresponding gifts in return;
- in most systems, there is no obligation imposed on the recipient to make a corresponding gift in return;

- whether the gift is beneficial or not to an unknown recipient will depend on the truthfulness and honesty of the giver;
- to the giver, the gift is quickly replaced by the body. There is no permanent loss to the receiver, the gift may be all.

In 1997 the original edition was published with new chapters and when health and welfare services constitute a main issue at stake nowadays, the new edition of the book seems relevant for the present debate with consequences for social policy, social psychology and possibly for the theory on attitudes.

b) *Peter Singer*

'*Darwinism Today*' is a series of books in the field of evolutionary theory. The series developed out of the Darwin programme at the London School of Economics, where the Darwin Seminars take place, and they present and popularise evolutionary theory from a cross-disciplinary point of view.

Peter Singer (1999), Professor of Bioethics in the University Centre for Human Values, Princeton University, argues that humans are born co-operators, that genuine altruism towards strangers does exist, and the time has come for revising outdated views of human nature. Moreover, Singer (1999) notes that nearly thirty years ago, in '*The Gift Relationship*', Titmuss, indicated that the Blood Bank survives on the altruism of its donors, and provides an opportunity by which a person can give something important to a stranger 'without making it possible for the stranger to return the favour in any way'. (p.55). Furthermore this altruistic practice happens in a society that does little to encourage altruistic tendencies and, to quote Singer (1999, p.55): 'In some respects, by its promotion of individualist competitiveness, positively discourages them'. Thus Singer (1999) considers that it is a mistake to argue that evolutionary theory states that people cannot be motivated by a desire to help others. It shows no such thing, which is just as well for the theory because, as we have seen, altruism towards strangers does exist, in institutions like Blood Bank'. As a consequence, and to quote the same author (1999, pp.57-58): 'It has to be admitted, through, that the sacrifice asked of a donor is not burdensome, and nevertheless only a small minority of people donate blood – in Britain 6 per cent. Bone marrow donation demands more of the donor.... but we need to understand more about what it is that

leads people to donate blood or bone marrow, so that we can base social policies on a more secure foundation of knowledge about human behaviour'. The same author (1999) notes that we live in a competitive society that emphasises consumption and relates status to media interest. In such a society 'there is little connection between status and the benefits one brings to others' (Singer, 1999, p.58).

After citing Thorstein Veblen in *The Theory of the Leisure Class* written a century ago, where it is shown how the rich use 'conspicuous consumption' and 'conspicuous waste' to exhibit their status, Singer (1999, p.59) asks the question: 'Can we strengthen concern for others by shifting ideas of status away from conspicuous consumption, in a more socially desirable direction?' He contends (1999) that with all the economic forces supporting the promotion of high level of consumption it couldn't be an easy task, but some thinkers are noticed working in this direction. And, to quote again Singer (1999, p.59): 'Whether or not they are right, this idea, and others in the same arena, are ripe for further investigation'.

Finally, Singer (1999) highlights several statements in defence of a new Darwinian approach. Some of them are:

- accepting that there is human nature, and seeking more understanding about it, so that policies can take into account the best evidence of what human beings are;
- rejection of any inference from what is 'natural' to what is 'right';
- expecting that within different social and economic systems, a lot of people will behave competitively for enhancing their status, achieving a position of power, and/ advancing their interests and those of their kin;
- expecting that people will react positively to genuine opportunities to enter into co-operation;
- promoting structures that give rise to co-operation rather than competition, and searching to guide competition into socially desirable ends.

At the onset of this study about Madeira it was theoretically hypothesised that as a result of the heavy weight tradition of tourism on the island and the regional culture of consensus about the sector, from the residents, they substantially support tourism. If the empirical

evidence is achieved, to what extent, altruistic surplus theory, methodological contributions on attitudes from Anastasi and Urbina, Gift Relationship Theory and Peter Singer's theoretical and methodological insights, can contribute to a building block theory in explaining the attitudes and behaviour of residents as regarding tourism?

6.4.4.2.1 Concepts and Variables

According to Kumar (1999) concepts are mental images or perceptions and as a consequence their meanings vary from individual to individual, whereas variables are measurable despite varying degrees of accuracy. The same author (1999) contends that measurability is the main difference between a concept and a variable. To quote Kumal (1999, p. 48): 'A concept cannot be measured whereas a variable can be subjected to measurement by crude/refined or subjective/objective units of measurement'. As a consequence the same author (1999) concludes that it is important for the concepts to be converted into variables.

The definition of principal theories and concepts in the research contributed to the design of variables included in the research instrument. The variables can be grouped as follows:

Knowledge Variables

- knowledge about the tax contribution of tourism;
- knowledge about the revenue producing contribution of tourism;
- knowledge about the role of tourism in creating employment.

Demographic Variables

- gender
- age
- education level
- work
- living through tourism
- contact with tourists
- business related with tourism
- family relation with tourism

Variables Measuring Attitudes

(23 statements)

Behavioural Variables

- support to tourism development
- encouragement of tourism growth
- attitudes to further tourism expansion

Knowledge Variables

One of the important factors that may help to explain attitudes to tourism is the accuracy of the residents' knowledge about tourism and its importance. In this, correct accuracy of knowledge about the economic importance of tourism was considered important to the research. With this in mind three variables were developed to test specifically the respondents' knowledge of tourism and its economic importance, following Davis et. al., (1988) They are:

- the tax revenue contribution to tourism;
- the revenue contribution of tourism;
- the employment contribution of tourism.

Demographic Variables

Another group of important factors that may help to explain attitudes of residents to tourism are their demographic characteristics. It was hypothesised that different patterns of attitudes can emerge as a consequence of different socio-economic and demographic profiles. With this framework in mind, eight variables were selected to test the patterns of attitudes according with demographics. These variables were inspired in the literature review, in previous chapters, namely on attitudes. They were:

- gender;
- age;
- education level;
- work;
- living through tourism;

- contact with tourists;
- business related with tourism;
- family relation with tourism.

Attitude Variables

To identify any underlying structure and patterns regarding residents' attitudes towards tourism in general, twenty-three variables were selected for measuring attitudes. The twenty-three statements were divided in four nominated constructs, each one containing specific questions. They were:

- attitudes to tourists (questions) : 4.1; 4.5; 4.8; 4.9; 4.10; 4.13; 4.21.
- attitudes to tourism industry (questions): 4.2; 4.4; 4.6; 4.7; 4.16; 4.20; 4.22;.
- attitudes to the economic impact of tourism (questions): 4.3; 4.11; 4.12; 4.23;.
- attitudes to future actions regarding tourism (questions): 4.14; 4.15; 4.17; 4.18; 4.19;.

Behavioural Variables

In order to explore the views of residents towards the development of tourism policy and their pressure on the Government, it was considered to what extent residents support tourism development. Taking this into account three variables were chosen to test the respondents' support for the development of tourism by Government. They were:

- support for tourism development;
- encouragement of tourism growth;
- support to further tourism expansion.

In accordance with methodological tradition, the above variables as a whole can be defined as categorical, independent and dependent variables, which can be classified as:

Categorical Variables

- knowledge variables
- behavioural variables
- demographic variables

Independent variables

- knowledge variables
- attitudes variables
- demographic variables

Dependent Variables

- behavioural variables
- attitudes variables

From the above classification, there are variables with a dual role. Whilst being categorical variables, the knowledge and demographic variables, also operate as independent ones with their explanatory power, in relation to the dependent variables, in examining the motives for residents' behaviour in relation to tourism. Similarly attitude variables also play the role of dependent variables.

There is strong empirical evidence to support that individuals and groups react within a whole system of values, attitudes and explanations, they hold about tourism (Pearce et. al., 1996). The same authors (1996) state that the emic approach (taking into account the residents' support), exploring the range of attitudes and directing the focus to the importance of certain impacts in constructing the attitudes to tourism, reveals a tool of paramount importance (Pearce et. al., 1996). The same authors (1996) contend that to understand community responses to tourism we must do more than provide a simple algebraic approach to this complex topic. In addition they emphasise that one should search for connections or networks of tourism impact items, with other beliefs, attitudes, values and expectations, as well as identifying 'a central cluster or core of images which communicates or portrays social representation' (Pearce et. al., 1996, p.78).

Theories already mentioned such as, 'altruistic surplus', 'gift relationship' and 'new, Darwinian theory of co-operation' provide a framework for a tourism-community approach to examine contribution of tourism for an interacting, communicating and dynamic community.

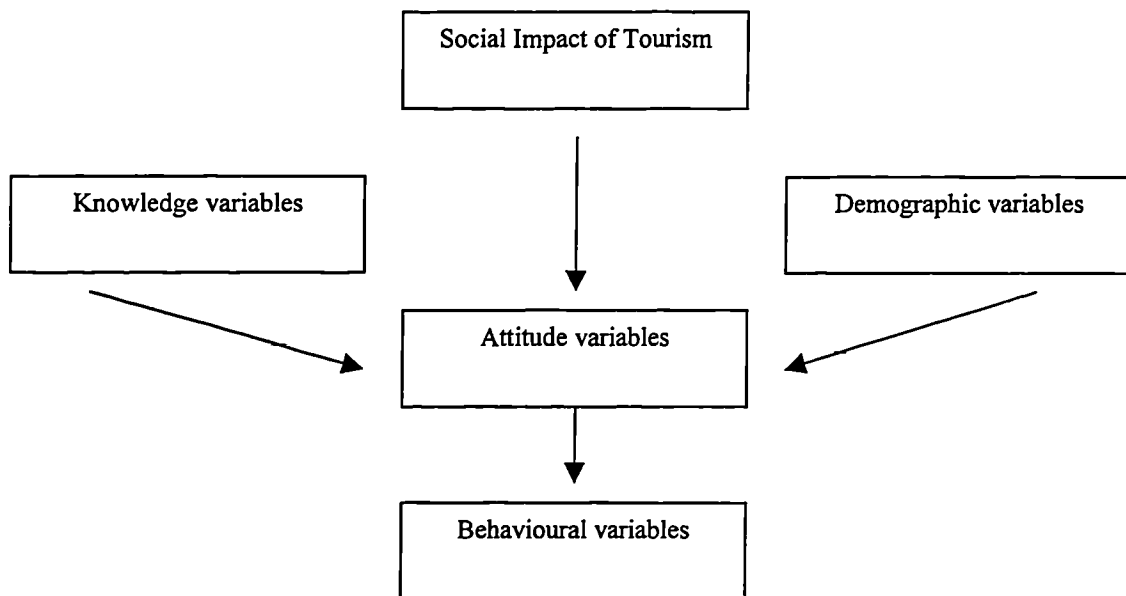


Figure 6.2 The Mix of Variables

Figure 6.2 presents the relationships of the variable hypothesised in this research. The relationship between variables is indicated by the direction of the arrows, which are pointed from the independent variables towards the dependent variables.

6.4.4.3 Data Collection Methods Utilised in the Study and Research Phases

There are usually two types of data sources:

- secondary;
- primary.

According to Dawes (1998), secondary data are where specification, collection and recording of data are done by some one other than the user. As a consequence, data are considered being in the public domain. On the other hand, primary data is where specification, collection, and recording of data are made by the user, to achieve information for a particular research objective.

The steps taken during the research process are shown diagrammatically in Figure 6.3.

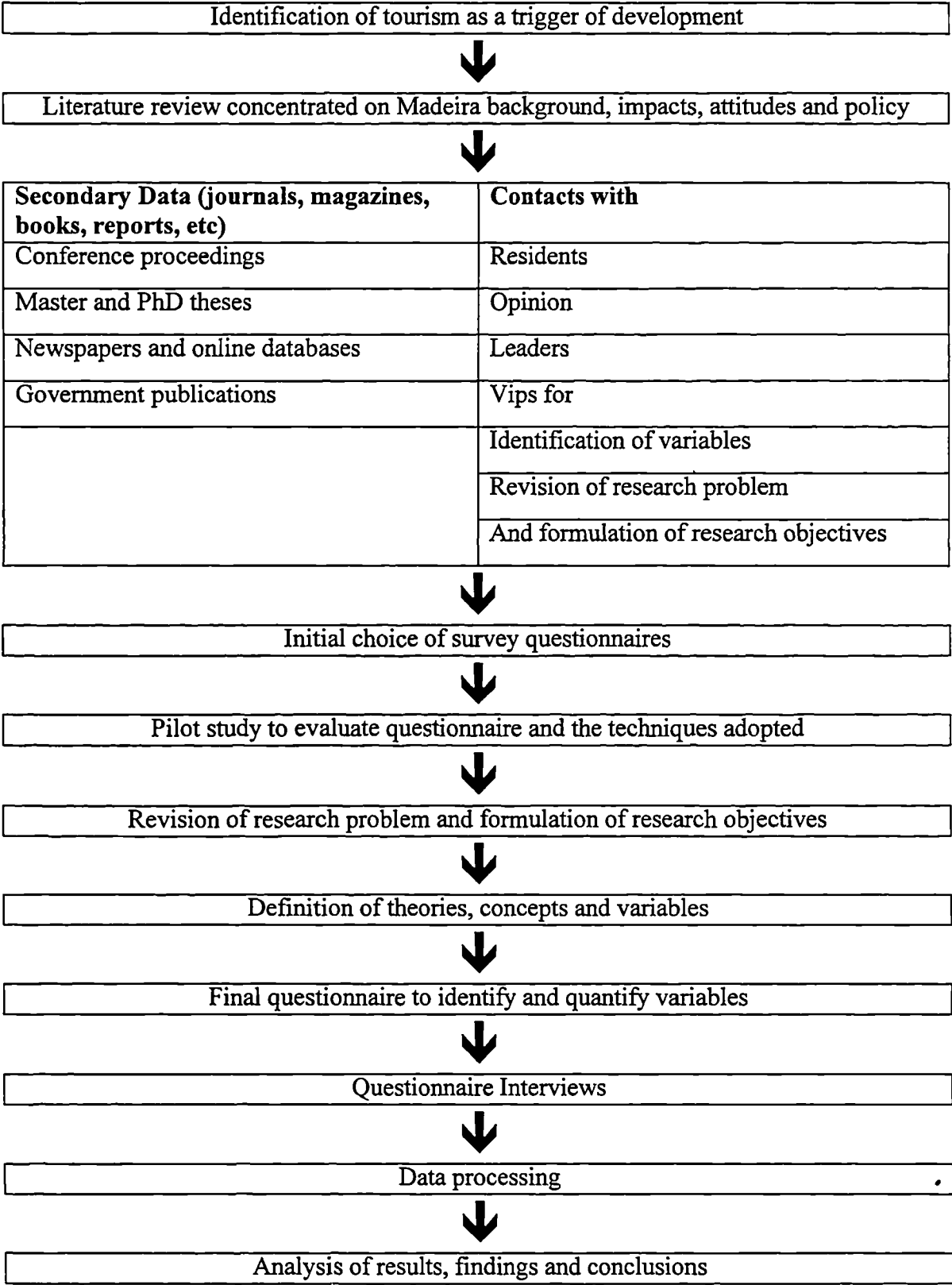


Figure 6.3 The Steps of Research Process

The research designed adopted is a combination of exploratory and descriptive data requirements, taking into account the research objectives and the appropriate forms of data. According to the literature (Yin 1994; Gilbert 1998) the research objectives can be classified as follows:

- deductive (testing hypotheses about causation/association);
- inductive (developing theory or empirical generalisation);
- interpretive (explaining the interior dynamics of a phenomenon);
- interventionist (recording results of intervention in event/setting).

In addition the appropriate forms of data can be quantitative (measurement) and qualitative (descriptive). Furthermore, the data requirements as being the questions which data should answer can be classified as:

- exploratory (what, who, when);
- descriptive (how much, how many);
- explanatory (how, why).

This study used eclectic and scientific methodological approaches in combination, in order to investigate its object of study. On the other hand and in addition the main survey took a scientific route in the use of the hallmarks of scientific research (Dawes, 1998). They were:

- purposiveness (has an aim and fills a gap in research literature, the attitudes of residents of Madeira to tourism);
- rigour (has a theory base providing a framework in the definition of variables, measurement, sampling and data analysis);
- testability (develops hypotheses that can be tested to see if the data collected support them);
- replicability (in the way the results are not achieved by chance);
- precision and confidence (due how close the findings, based on the sample are as regarding the reality; confidence, the probability that our estimate is correct; ex: 95% confidence intervals);

- objectivity (where conclusions derive from data analysis and are based on facts);
- generalisability (can be generalisable because has a consistent sampling design);
- carefulness (because based on variables, selected from literature review, pilot study, exploratory interviews and talks with experts to select the most important variables).
- Collection of data on a pre-coded questionnaire. (The research was based on the utilisation of personal door to door interview in order to collect the type of data required for the study).

6.5 Construction of the Questionnaire: The Pilot

6.5.1 Origin

Before the application of the pilot questionnaire discussions and meetings were carried out both with adults and students of hotel management of Madeira University in Funchal. This enabled that the content of the items would be adequate and the type of language would be adapted, from a version of Davis et. al., (1988), designed to assess and segment local residents of Florida, with respect to their attitudes, interests and opinions toward tourism. This study was considered important because of the significance of public attitudes in generating a hospitable environment for tourists and tourism in general. The same authors (1988) contend that expenditures by a state or agency to promote tourism are wasted if the residents are hostile towards tourism and tourists. On the other hand they argue that if the hostility prevails the money will be better spent to educate residents on the positive impacts and consequences of tourism to their economies. In addition 'if the underlying reasons for negative attitudes can be identified, active attempts can be made to rectify or at least minimize the negative effects for the tourism industry' (Davis et. al., 1988, p.2). However the same authors (1988) note that at present there is a lack of tourism research literature on issues of social and institutional impact on host Governments and residents where the impact is more relevant.

The data whose American study were collected by a mail survey of Florida residents. The 2000-name mailing list was obtained from a commercial direct mail agency. The list was a randomly selected sample of all persons 18 years or older living in Florida. Residents were asked to give their feelings towards tourism in Florida by completing a four-part questionnaire to be returned in a postage-paid reply envelope. A letter emphasised the

importance of residents' opinion in influencing the future role of tourism in Florida. The same authors (1988) noted that of the 2000 surveys sent, responses were obtained from 415 residents, giving a response rate of 21%.

Davis et. al., (1988) state that their questionnaire followed the usual research procedures. First, a sampling of residents was chosen to participate in a focus group session. In the focus group, residents were encouraged to point all concerns, benefits, and disadvantages of the tourism industry in Florida. The results of the selected focus group produced a questionnaire, which was used as a pre-test of 30 Florida residents to remove ambiguities and to obtain content validity. The questionnaire was then mailed to the sample of residents.

According to the same authors (1988) the first part of the questionnaire contained five questions to assess the residents' broad knowledge regarding the tourism industry. Accurate responses to questions about issues such as tourist-generated revenues, taxes, employment, total advertising expenditures by the state and the existence of tourism-related associations, that are concerned about relevant issues to residents were used to build a knowledge score. Part two, consisted of thirty one A I O (Attitudes, Interests, Opinions) questions related toward components of tourism industry in Florida. These questions contained such components as perceptions of tourists, employment opportunities, taxes, required services and facilities, and the development of tourism. The questions were rated on a five-point Likert scale ranging from 5 to 1, with 5 representing strong agreement, and 1 representing strong disagreement. In part three, residents were asked to rank potential advantages and disadvantages provided to residents' families to tourism. The final part of the questionnaire emphasises demographic aspects such as sex, age, residence, education, and occupational status.

The pilot questionnaire for this study was based on the American study with adjustments made following the discussion in Madeira. The resulting pilot questionnaire was tested on a number of people from Madeira, male and female, (four hundred and seventy eight). See Appendices 1, 2 and 3.

The American questionnaire contained 31 statements. This research used 27 statements for different reasons. In effect the statement 'I believe our legislators should support

tourism development efforts in our island’, was considered in the pilot study as a dependent variable and as a consequence was kept separately with a different treatment. The statement and ‘Madeira has a wide selection of quality restaurants’ and the statement ‘Island’s hotels are among the best I have seen’ were considered not relevant according with the objectives of the research. On the other hand the David’s statement ‘I believe the state legislature should place limitations on population growth’ was considered inadequate for the pilot study. The knowledge questions of the pilot study are constituted by 3 statements against 5 of the American study, which includes statements dealing with tourism related associations and advertising expenditures by the Government, not included in the pilot. Moreover the pilot presents a different structure for demographic aspects.

This (American study and discussions in Madeira) enabled the researcher:

- to have an understanding and feeling of the residents;
- identify relevant issues from the residents;
- improve and refine the questionnaire;
- to identify a bias, due both to students being over-represented and non accurate convenient sample;
- to refine research objectives and research questions;
- having awareness of the weaknesses of the pilot questionnaire as a research instrument.

A pilot or pre-test serves for testing both the general questionnaire and particularly the scales. When the entire questionnaire was completed and to quote Areck and Settle (1995, p.178): ‘When all the items have been organized, the sections arranged, the instructions inserted, and the responses and record format precoded’, the entire questionnaire was used on a pilot sample, for assessing how they respond to the instrument. According to Gilbert (1992), the draft questionnaire should be tested to ensure:

- it is bias free;
- comprehensibility of the questions;
- the questionnaire has logical flow;

- technical aspects like space to responses, clear cards when appropriate, length;
- evaluation of fieldwork procedure and timing.

As mentioned before a sample of 478 individuals were selected to test the pilot questionnaire in 1996. These individuals were students and a free choice from the students in relation to other respondents. As a consequence the results showed a bias in relation to the number of students interviewed, 102 (21.5%). This number is exaggerated when compared with the number of students of Madeira. However the pilot questionnaire was useful for the design and implementation of the final one used in the main survey. Later in this chapter more details about the pilot questionnaire will be emphasised.

6.5.2 Decision on Data Collection Method

The decision on the data collection technique commenced with two main parameters in mind. Firstly the explicit objectives of the study required the collection of a large amount of information, and secondly, the data to be collected were eclectic and mixed in nature.

The decision to use social survey questionnaires as a method of collecting data and explore the research area was both operational and pragmatic, based on the assessment of the other alternatives, classified under primary sources namely ethnographic style interview and observation. It was the methodological approach used by Fitchen (1990) studying farm, family and community change in United States, through an innovative, eclectic set of methodologies. To quote Fitchen (1990, p. 15): ‘In addition to quantitative and survey research, ethnographic observation would be a useful methodology to provide context and deptheven a very small amount of field observation could enhance both the design of questionnaire data, and yet requires very little extra input in time or methodological training’.

However the method used in this study was mainly questionnaire approach. Moreover, the instrument of the survey being a self administered questionnaire with the help of the interviewer and using face-to-face interview, reveals some advantages in relation to other methods such as mail survey or telephone survey.

- low costs;

- good assessment, observation and probing;
- large samples;
- eclectic and vast information;
- the interview are generally conducted at the residence of the respondents;
- good response rates;
- suitability for more quantitative data.

Figure 6.4, being to some extent self-explanatory shows the advantages and disadvantages of other survey methods such as mail survey and telephone survey when compared with personal interview survey (household survey).

	Mail Survey	Telephone Survey	Personal Interview Survey
Cost (assumes good response rate)	Often lowest	Usually in-between	Usually highest
Ability to probe	No personal contact or observation	Some, through elaboration on questions, but no personal observation	* Greatest opportunity for observation, building rapport and probing
Interviewer bias	No chance	Some, perhaps due to voice inflection etc	Greatest chance
Known respondents	Least	Some	* Greatest
Sampling problems	Up to date, accurate mailing list and low response rates	Up to date, accurate phone subscriber list, unlisted numbers, no phones	* Interviews could be prearranged
Impersonality	Greatest	Some due to lack of face to face contact	Least
Complex questions	Least suitable	Somewhat suitable	* Most suitable
Visual aids use	Little opportunity	No Opportunity	Greatest opportunity
Rapport	Least	Some	Greatest
Likely reaction	"junk mail"	"junk calls"	Invasion of privacy
Control of interview environment	Least	Some in selection of time of call	* Greatest
Time lags	Greatest	Least	* Prearrangement
Suitable questions	Simple, mostly dichotomous (yes/no) and multiple choice	Some opportunity for open-ended questions	* Greatest opportunity for complex questions
Skill requirement of researchers	Least	Medium	Greatest

Figure 6.4 Comparison of Possible Survey Types

Source: Gilbert, D., 1992, p 158

According to Veal (1992) the household questionnaire is considered the 'standard' research tool in tourism. It can be either self or interviewer completion. In addition it is generally dear cost, sampling large population, long length and with a high response rate. A variation on the standard household questionnaire interview survey, (Veal, 1992) is to combine interviewer-completed and self-completed aspects. However the length of interviews, the problem of contacting representative samples, and very often the wide geographical spread of the area to be investigated make this type of survey expensive. In the case of Madeira study the volunteer work of students overcame these problems. In addition there is an important feature to note, when comparing this type of survey with other survey types, which is its potential for high response rate.

6.5.3 Scaling

This research was based on a previous questionnaire. However the following procedures and theoretical considerations were studied and taken into account in this research.

According to Clark et. al., (1998) the process for designing an attitude survey is in five parts:

1. Developing and refining attitude statements;
2. Scaling;
3. Administering the questionnaire;
4. Scoring; and
5. Validation of the test.

Scaling is the process of creating a continuum on which objects are located according to the amount of the measured characteristics they have (Aaker et. al., 1995). Attitude scales have a total score indicating the direction and intensity of the individual's towards stimulus. Following Anastasi and Urbina (1997, p.405): 'In the construction of an attitude scale, the different questions are designed to measure a single attitude or unidimensional variable, and some objective procedures are usually followed in the effort to approach this goal.' Furthermore, since the questionnaire uses a Likert scale for measuring attitudes of residents towards tourism it is convenient to emphasise the main issues of the scale design. In effect in attitude scales, generally, respondents indicate their agreement or disagreement with statements about the object of the attitude (Anastasi and

Urbina, 1997). As a consequence, and according to the same authors (1997), special procedures should be taken into account for achieving unidimensionality or homogeneity of the items, equality of distances between units and possibility of comparison of scores from scale to scale.

The construction of attitude scales have received huge attention in the literature (Thurstone 1928; Thurstone 1929; Stevens 1946; Green and Rao 1970; Wicker 1972; Lehmann and Hulbert 1972; Falthzik et. al., 1974; Haley and Case 1979; Garland 1991; McDougall and Munro 1994). Nevertheless, there are three major approaches to attitude scale construction, commonly cited in the literature. These approaches are represented by Thurstone, Guttman, and Likert types of scales.

Ekinçi (1999), citing two studies offered by both DeVellis (1991) and Churchill (1979) highlights eight steps in constructing a scale. They can be summarised as follows:

Step 1 Determine what to measure (specify domain of construct);

Step 2 Item generation, which captures the domain. According to Churchill (1979) the sources can be existing literature, consumer reports, critical incidents and focus groups;

Step 3 Item development (wording and meaning of the item matching the content to be measured);

Step 4 Before administrating the provisional scale: (choice of the type of rating and sample size);

Step 5 Purifying the measure: consisting of forms of analysis dealing with internal consistency and validity of the instrument. Churchill (1979) outlines correlations, coefficient Alpha and factor analysis;

Step 6 Replication of the study: where it is required to collect another set of data from a representative sample. To quote Ekinçi (1999, p. 174): ‘The scale-testing procedure is repeated in order to confirm the underlying theory. As the theoretical structure is established in the previous stages, this type of analysis is confirmatory in nature and therefore, the confirmatory factor analysis has to be used instead of exploratory factor analysis’.

Step 7 Re-assessing reliability and validity: the assessment of reliability and validity analysis is repeated with new sample;

Step 8 Developing norms: this is the final stage in scale construction and regards developing standards and norms for decision-makers. According to Churchill (1979) norm quality is a function of both the number of cases on which the average is based and their representativeness. To quote Churchill (1979, p. 72): ‘The larger the number of cases, the more stable will be the norms and the more definitive will be the conclusions that can be drawn, if the sample is representative of the total group the norms are to represent’.

6.5.3.1 The Likert Type Scale

There is an extensive literature dealing with Likert-Type scale (Likert 1932; Komorita 1963; Jacoby and Mattel 1971 and 1972; Flamer 1983; Wyatt and Meyers 1987; McIver and Carmines 1988; Alboum 1997; Ryan and Garland 1999). The Likert-type scale commences ‘with a series of statements, each expressing an attitude that is either clearly favourable or clearly unfavourable. Items are selected on the basis of the responses of persons to whom they are administered in the process of test construction’ (Anastasi and Urbina, 1997, p. 406). According to the same authors (1997) the principal criterion for item selection is internal consistency. Moreover, Likert scales use a graded response to each statement. The responses are usually grouped with the following categories: strongly agree, agree, neutral, disagree, and strongly disagree. To score the scale, the responses are rated 5, 4, 3, 2, or 1 from the favourable to the unfavourable end. For example, ‘strongly agree’ with a favourable statement receives a score of 5, and ‘strongly disagree 1’ with an unfavourable statement. To quote Anastasi and Urbina (1997, p.407): ‘The sum of the item credits represents the individual’s total score, which must be interpreted in terms of empirically established norms’. The Likert scale is also called a summated scale due the scores on the individual item being summed to produce a total score for the respondent (Aaker et. al., 1995). Furthermore, an important assumption of this scaling method is that the statements measure some aspect of a single common factor; otherwise, the items cannot be summed. As a consequence the scale is unidimensional (Aaker et. al., 1995; Clark et. al., 1998).

In this study the Likert scale measures the residents attitudes of Madeira towards tourism, searching differences in attitudes (positive-negative), background factors associated with attitudes, the interrelation of attitudes (including factor analysis and other analysis methods) and also trends in attitudes.

6.5.3.2 The Reliability of the Scale

Reliability can be defined as the extent to which the same measurements of individuals achieved under different conditions get similar results (Everitt and Wykes, 1999). In order to find the optimum set of statements which leads to an increase of the reliability of a scale a technique is used called 'item analysis' (Oppenheim 1992; Ekinici 1999). According to the general literature, several methods are available to assess the scale reliability: test-retest, parallel test form, internal consistency (Oppenheim, 1992). Churchill (1979) advocates that 'coefficient alpha' should be the first measure being calculated to assess the quality of the instrument, which aims to verify the internal consistency of the scale. Thus, a low coefficient alpha indicates the sample of items performs poorly in capturing the construct which motivates the measure, and, a large alpha indicates that the items of the scale correlates well with true scores (Churchill, 1979). Therefore, a coefficient alpha value of .50 and .60 is sufficient for the early scale development stages. Oppenheim (1992) however, suggests coefficient alpha of .85 as enough for judging the reliability of an attitude scale. Thus this issue continues to be a polemical one.

6.5.3.3 The Validity of the Scale

There is, also, an extensive literature about validity (Campbell and Cook 1979; Churchill 1979; Schwab 1980; Tull and Hawkins 1987; Murphy and Davidshofer 1991; Oppenheim 1992; Litwin 1995; Clark et. al., 1998; Everitt and Wykes 1999). In general terms validity is that it measures what it is supposed to measure (Oppenheim, 1992). Litwin (1995) emphasises validity as the assessment of how well a survey or index, measures what it is intended to measure. Clark et. al., (1998) on the other hand, note that validity is about ensuring that the measuring instrument measures what is intended to measure and Everitt and Wykes (1999) argue that validity is the extent to which a measuring instrument is doing what it was intended to do (measuring) - so consensus seems to be achieved. Furthermore, Clark et. al., (1998) suggest that a valid attitude measurement in fact measures the specific attitudes one set out to find and not some alternative attitudes, despite being closed and related. Moreover, reliability and validity are related concepts. To quote Clark et. al., (1998, p. 129): 'An unreliable scale has no validity, but a reliable one does not guarantee validity. It does however, go some way to support a claim for validity'. The same authors (1998) note that if it is relatively easy having a measure of

reliability of a survey it is more difficult telling the same as far as validity is concerned. Oppenheim (1992) outlines four types of validity. They are:

1. Content validity, which seeks to define that the items or questions are well mixed in the sample about the content domain to be measured. As a consequence face validity, as the examination of the content of the items is dangerous;
2. Concurrent validity, which shows how well the test correlates with other good measures of the same topic, administered at similar time;
3. Predictive validity, which shows the forecast power of the test;
4. Construct validity, which shows how, well the test or questionnaire matches theoretical assumptions about abstract constructs.

6.5.3.4 Problems of Likert Scale

Following Clark et. al., (1998) the scale assumes the “groupness of attitudes”. As a consequence the dimensions are considered to be related and only total sample scores can be interpreted. The objective of an attitude survey will be to investigate the positive-negative tendency regarding the object.

In this research, positive and negative attitudes towards tourism, with the sub areas of attitudes towards tourists, tourism industry, economic impact and future actions are examined and assessed.

The framework of Likert, to quote Clark et. al., (1998, pp.124-125): ‘Is to recognize that attitudes are not held independently within a person but exist in a coherent whole and therefore to capture an attitude it is necessary to find a batch of attitudes and then to isolate the one which is the interest of the research. As there is an assumption that the dimensions being sought are related, the statements which represent them should correlate’. Consequently it is of paramount importance the relatedness between statements being represented mathematically by several types of correlation according to the ‘groupness principle’.

However, despite its advantages, the Likert scale also presents a number of problems. Following Clark et. al., (1998) attitudes are measured by scales because they are relative and subjective concepts. Thus there are no absolute values in this area.

Several criticisms have been made regarding the Likert scale. According to Oppenheim (1992) and Szivas (1997) they can be summarised as follow:

- Firstly, the problem of equal intervals within the scale. To what extent the distance between scale points 2 and 3 is the same as between scale points 4 and 5?
- Secondly, there is an uncertainty over the inter-subject judgement of the scale. To what extent an 'agree' from subject A means the same as an 'agree' from subject B in relation to the same statement?
- Thirdly, the problem of the position of the middle point. Called quite often 'uncertain' or 'neither agree nor disagree' or 'neutral', the question at stake is to what extent the middle point can be seen as the real midpoint between the two extremes of agreement and disagreement? Is it 'really' a neutral point?

6.6 The Final Questionnaire (see Appendices 4 and 5)

The construction of a research instrument is an important aspect of the main survey because the findings and conclusions depend of the information collected, and the data collected depend upon the research instrument. To quote Kumar (1999, p.121): 'The research tool provides the input into a study and therefore the quality and validity of the output, the findings, are solely dependent upon it'. According to the same author (1999), in spite of the importance of the research instrument no specific rules or guidelines exist in order on how to construct a research tool.

In this survey the final research instrument took into account both the objectives of the study and the research questions in its structure and arrangement of the questions. Moreover, it was built upon and developed further from the pilot one. To put it another way: the first questionnaire has made possible the second one.

6.6.1 The Sample

Sample can be considered as a subset of well-defined universe (Arber, 1999) and according to Kumar (1999) any survey should take into account the following:

- the study population;
- sample size;

- sample design or strategy;
- sampling unit or elements;
- sampling frame;
- sample statistics;
- population parameters.

In this main survey the above criteria contributed to influence the fieldwork and the target population was selected regarding the research objectives, research questions and research boundary.

The main survey was carried out in Funchal, Madeira, Portugal, during April, May and June of 1999. This time period was selected because it was considered a normal season (neither peak nor low) with a neutral influence on residents' attitudes. The selected geographical areas in Funchal, the capital of Madeira, were three administrative units (freguesias): the biggest - S. Martinho, with the population of 21,475; average - S. Pedro, with a population of 9,917 and smallest - Se, with a population of 3,172. The three 'freguesias' (parishes) were assumed to have a population with similar characteristics, mainly urban based, despite S. Martinho, the biggest, being in part a suburb of Funchal. Residents were very collaborative in responding to the questionnaire. This large sample gave more valid results, though personal interviews with such a large number was both labour intensive and time consuming. An alternative method would be to send the questionnaires via the post to a large number of random addresses picked up from the ER (Electoral Register). However, it was found, from contacts with respondents, that only a minority of questionnaires would be returned with consequences for the sample and support of findings. On the other hand, local and regional authorities were found supportive both regarding the research survey and the use of electoral information.

The self-administered questionnaire (with the help of the interviewers) was distributed. The universe sampled was adults aged 18 or over living in the three freguesias at the time of the survey. In addition it used a random or probability sample where each element in a population has a known and non-zero chance of selection and which is considered adequate for description of the population and for testing empirical hypotheses. The sample was based on the electoral register in order to enable inferences and predictions to

the general population. Each elector became the basis of sample selection and a list identifying the required electors of the three freguesias was provided, after personal contacts with the presidents of the three parishes in order to obtain information from the respondents and consequently the findings. On the other hand the Electoral Register (ER), up-dated, was considered useful as sampling frame. In effect the ER is a list of all people eligible to vote and includes the name and addresses of each person (Lynn, 1996). In addition the ER of the three freguesias was both up- dated and computerised enabling the sample to be drawn easily. However the ER has some disadvantages as a sampling frame. It is not a complete list of the adult population and migrants, young people and ethnic minorities are underrepresented (Marsh, 1995).

The survey consists of 397 questionnaires, presented on a door to door basis with the help of interviewers. There were few refusals, non-contacts, and non-interviewable, despite people who have moved.

6.6.2 The Sample Calculation

Sample design is important as regarding to the reliability of statistical findings. According to Ekinici (1999) the main objective of any sampling design is to provide guidelines for selecting a sample that is representative of the population enabling a specific amount of information about the population, with affordable costs and giving guarantee that the findings can be generalised across the population. On the other hand the objective of this study is to investigate the relationship among the variables and to test theories.

The revision of the specific literature shows that there is no consensus on the sample size, which is required to achieve the statistical significance. Several contributions are useful to guide the sampling procedure in this research. The following formula is used in order to find out the sample size for this survey (Ryan, 1995, p.178):

Formula:

$$n = \frac{NPq}{\frac{(N-1)B^2 + Pq}{Z^2}}$$

Where: n = sample size, N = population size, P = population proportion or estimate, q = 1-P, B = allowable error, Z = Z score based on desired confidence level.

The formulation requires decisions on the population and what proportion of the population is to be considered. The population of the three 'freguesias' is 25,944.

If there is no *a priori* assumption, - as in the case of this research, then the value of P=0.5 is commonly used. In this research the allowable error is $\pm 4.9\%$. In a normal distribution, 95% of all the cases fall within the range of the mean plus or minus 1.96 standard deviation (or two standard deviation). So, the Z values 1.96 (Ryan1995; Ekinci 1999).

$$n = \frac{25,944 (0.5) (0.5)}{\left[\frac{(25,944-1) (0.049)^2 + (0.5) (0.5)}{(1.96)^2} \right]}$$

n = 398 (but 450 was assumed as sample size for compensation of refusals and other missing cases)

$$25,944 / 450 = 57,65 = \pm 58$$

Every 58 elector of the three freguesias was selected on a random basis in a total of 450. The survey consists of 397 (one was considered not useful) questionnaires. The difference in relation of 450 was due to migration, refusals, non-contacts, non-interviewable and people moved from previous addresses. Following some literature for a population of 200,000 the sample needed is 383. For a population of 300,000 and up the sample needed is 384 (STB, 1993). Funchal, where the survey was based has a population of 115,403 according to the official Census of 1991.

6.6.3 Changes to the Pilot Questionnaire

The pilot questionnaire was constituted by three knowledge of tourism questions (first part). Thirty statements on attitudes to tourism and its impacts in general, based on a Likert scale constituted the second part. In the third part benefits and disadvantages of tourism (rank ordering questions) and part four consisting of personal and demographic

data. The sample of the pilot questionnaire was purposive. From a methodological point of view these samples have some weaknesses. According to the general literature these are samples with probability equal to zero or one of being selected. Arber (1998) notes that purposive samples are more adequate if the objective is:

- exploration and theory development;
- developing and testing survey research instruments-pilot work;
- selection of a small number of first-stage units.

As a consequence, due to the above features, the sample of the pilot questionnaire being purposive or convenient presented vulnerability as a research instrument.

The main survey questionnaire presents different coding and different question numbers. Improvements were also made to enable the data processing stage to flow more easily, and for inclusion on a formic software package. Secondly, some question wording was changed due to problems of imprecise instructions and procedure.

1. Question 9 of the pilot questionnaire disappeared and was replaced by questions 5.1; 5.2; and 5.3; of the new version. These three questions were more useful to investigate to what extent residents supported tourism development and as a consequence, providing feedback about their views about tourism policy.
2. Questions 20 and 23 of the pilot were not included in the main survey version, because they were considered non-relevant for measuring the patterns of attitudes as hypothesised before and according with the research objectives.
3. Question 19 of the pilot was out in the new version. It was considered not being a must as regarding the measuring of attitudes towards tourism.
4. Question 22 of the pilot is out in the new version. Again this question did not match the requirements of research objectives and questions as a value added.
5. Question 26 was out in the final questionnaire. Again it was not considered, relevant for assessing the patterns of the attitudes of residents to tourism.
6. In part 3 of the pilot, respondents were asked to rank-order benefits and disadvantages provided to residents' families by the tourism sector. The new version asks a question (7.5) weather residents are family related or not family related to tourism. This last question was considered, as a demographic variable

with more explanatory power for identifying relationships between attitudes and demographic variables, as stated both in the objectives and research questions.

7. The personal and demographic section of the pilot changed in the new questionnaire. The new arrangement and structure constituted by gender, age, education level, work, living through tourism, contact with tourists, business related with tourism and family relation were thought to be better predictors in the identification of the factors that influence attitudes of residents and the relationship between demographic characteristics and attitudes towards tourism as hypothesised.

6.6.4 The Main Questionnaire

The revised and refined questionnaire used in the survey is presented in Appendix 2. The returned questionnaires were numbered and then scanned in using the 'Formic software package. The data were then included in SPSS software package, which was used for analysing the data.

The questionnaire is required to collect a range of data related to attitudes of residents towards tourism in general. This causes a need for a broad pool of questions utilising a specific design. The length of the questionnaire is four pages. However from 6 minutes to 15 minutes required to complete the questionnaire motivates the interest of both interviewer and residents. There are particular reasons, which allow for the use of the questionnaire:

- the topic is interesting for a tourism culture island;
- the questionnaire would be administered on a door to door basis, where residents feel confident and at home;
- residents were informed of the importance of the questionnaire for Madeira and for Madeira University;

As a consequence high rate of return was expected and achieved.

6.6.5 The Research Interview

When conducting an interview survey there are two basic ways of data collection: Contracting an external data collection agency or manage an in-house data collection

crew (Alreck and Settle, 1995). For this research the interviewers were selected from students of Madeira University, with the participation of the author as interviewer as well. The team of students, filled the questionnaire and were trained and supervised following some guidelines such as:

1. Overview of the project;
2. Distribution of material;
3. Discussion of the questionnaire and material;
4. Discussion of matters arising;
5. Reporting extra information.

Burgess (1994) considers that the team field research operates in different ways depending upon the research context. In the case of residents' research in Madeira the team field research were constituted by Madeirans identified with the peculiar features of the island, performing in a co-operative and reliable way.

Thomas (1996) indicates the mode of data collection as the way through which information is elicited and recorded, pointing out as examples the following:

- face to face interview;
- telephone interview;
- postal or other self-completion questionnaire, including diaries;
- observation of behaviour;
- physical weighing, measuring or testing.

Some of them were presented more in depth before in this chapter.

The same author (1996) notes that face-to-face interviews can cover complex topics and may achieve high rates of response. In the case of Madeira, a face-to-face interview via door-to-door self administered questionnaires, with the help of interviewers was the process selected. On the other way the questionnaire was in part inspired in a US version, used in Florida in 1988, as already mentioned and developed. However despite the problems of translation from English to Portuguese and the multinational situation the

respondents were equivalent across countries. As a consequence, no special judgements, quota or purposive samples, were necessary in this case (Tull and Hawkins, 1993)

6.7 Design of the Main Research Instrument

6.7.1 Introduction

According to the literature (Alreck1999; Sapsford and Jupp 1996; Marsh 1995; Dawes 1998) there are some criteria for designing a good questionnaire, which contributed for the design of the tool used in this main survey. They can be summarised as follow:

- to plan what to measure;
- to select on formatting of the questions (structured/unstructured)
- to use appropriate wording regarding the respondents, taking into account two main validity issues such as: instrumentation bias and interviewee (response error) and trying to avoid bias and error;
- to decide on convenient sequence and layout;
- to implement pre-test for assessing if there is or not ambiguity.

Dawes (1998), advises about things to note in pre-testing. They are:

- 'meaning'(how do respondents interpret the questions?);
- is the questionnaire interesting and attention capturing?
- are skip patterns easy to follow?
- does the questionnaire flow easily?
- how long does it take to be completed?
- need to debrief very carefully;
- possibility of repeating the procedures.

Having presented the research process by which the research questions have been refined and the formulation of objectives revised, the following task is to discuss the design of the final research instrument. The main tasks of the research instrument were:

1. To measure the attitudes of residents towards tourism;

2. To identify the extent of positive and negative attitudes of residents towards tourists, tourism, economic impact and future actions;
3. To measure the knowledge of residents about tourism;
4. To measure demographic variables;
5. To measure behavioural variables;
6. To capture the relationship between knowledge of residents about tourism, attitudes, demographics and their behaviour towards the development of tourism.

This questionnaire was based upon an instrument developed by Davis et al. (1988) to examine the feelings of Florida residents towards tourism. Consequently what follows is the presentation of the research instrument. The discussion will follow the structure of the questionnaire which consists of the following:

6.7.2 Section 1: Knowledge Variables

The knowledge variables are tax revenue, revenue producing and employment. Section 1 of the questionnaire is reproduced below.

Please indicate your answer by putting a cross in the appropriate box (es).
The following questions are concerned with your views about the economic importance of tourism on the Island of Madeira.

Q1. Approximately what percentage of the tax revenues do you believe the tourism industry in Madeira generates.

0--10%

11--25%

26--50%

more than 50%

have no idea how much

Q2. Is the tourism industry in your opinion the largest revenue producing industry in our island?

yes

no

Q3. Approximately what percentage of Madeira's employment is generated by the tourism industry

0--10%

11--25%

26--50%

over 50%

have no idea how much.

Question 1 (Q1) asked whether the respondents had awareness of the contribution of tourism as a tax revenue generator. The official figure is about 25%.

Question 2 (Q2) deals with tourism industry as the largest revenue producing industry assuming it is, according, official information.

Question 3 (Q3) asked about the percentage of employment in Madeira generated by tourism. Official figures state 25%.

The three above questions seek to measure the knowledge of residents towards the economic importance of tourism.

6.7.3 Section 2: Attitudes of Residents Towards Tourism (Attitude Variables)

Section 2 was concerned with particular dimensions for identifying residents' attitudes towards tourism. It consists of 23 statements on attitudes oriented towards components of tourism industry involving four nominated constructs: attitudes to tourists, tourism industry, economic impact of tourism and future actions related to tourism. These variables were included in previous studies, namely Davis et. al., (1988). The main objective is to assess the residents' attitudes towards the social impacts and consequences of tourism. Section 2 is shown below.

Question 4 below is a list of 23 statements about tourism.

To what extent to you agree or disagree with them. Please consider all the statements.

	strongly disagree				strongly agree
4.1. As a whole, tourists who come to Madeira are inconsiderate of our island resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2 If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3 The tourism industry provides many worthwhile employment opportunities for Madeira residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4 On the whole, the tourism industry regulates and policies its activities well	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5 I like most tourists as long as they do not move here to stay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 4.6. I believe that tourism, in Madeira has cause taxes to go up for Madeira residents because of extra police needs, roads and so on
- 4.7 I believe that the tourism industry has improved the quality of life in the island
- 4.8 This island would be a better place if there were no tourists here
- 4.9 The tourists that come to Madeira are usually not very friendly
- 4.10 The tourists do not pay their "fair share" for the services provided them
- 4.11 The tourism industry is good for Madeira's economy
- 4.12 Overall the tourism industry does a good job in supporting the region in which I live
- 4.13 The tourists I have seen in our shopping malls and stores are generally rude and pushy
- 4.14 I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use
- 4.15 I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island
- 4.16 The tourism industry in our island is too comercialized
- 4.17 I am in favour of limiting economic growth in the island in which I live
- 4.18 I feel that Madeira is growing too fast
- 4.19 Madeira is too dependent on on tourism

	s.disagree				s.agree
4.20 The airline connections in Madeira are good because of tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.21 There would be little traffic congestion if not for the tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.22 The tourism industry has too much political influence in the island	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.23 The advertising money spent by the Government and related bodies to attract tourists is a good investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6.7.4 Section 3: Government Support (Behavioural questions)

Q5 The following three statements ask for your views about Government support for tourism

5.1. Our legislators should support tourism development efforts in our island

yes

no

5.2 The growth of tourism needs further encouragement in the island

yes

no

5.3. The planned expansion to attract more tourists to the island is a good idea

yes

no

Residents' views about Government support for tourism were included. These variables were measured by examining the view of residents about Government support for

tourism, Government role in encouraging the growth of tourism and importance of *increasing the demand for tourism

The above questions were considered as dependent variables and their main concern was, to assess the attitudes of residents towards tourism development policy and consequent pressure on the government.

6.7.5: Section 4: Demographic Questions (Demographic Variables)

The demographic variables considered to be determinants of attitudes were: gender, age, education level, education in tourism, occupational status, living through tourism, contact with tourists, business relation with tourism and family relation with tourism. The Section 4 - Demographic Questions are presented below.

Q6 About you

6.1 Are you :

Male

Female

6.2 Which age group are you in ?

15 - 24

25 - 34

35 - 44

45 - 54

55 - 64

+ 65

6.3. What is your highest education level (tick one only)

Less than full primary school

Primary school

Secondary school

Higher education

6.4 Have you carried out educational studies of tourism Yes
No

Q7 About your work

7.1 Which of the following categories applies to you?

1. Full-time employment

2. Part-time employment

3. Student

4. Unemployed

5. Pensioner

6. Housewife / Husband

7. Other....*

7.2 Do you earn your living through tourism? Yes
No

7.3 Do you have direct contact with tourists as part of your work? Yes
No

7.4 Do you own any business related to tourism? Yes
No

7.5 Is any member of your immediate family involved in tourism as a source of income or employment? Yes
No

The gender of the residents was asked in order to investigate gender comparisons within the data set. It was thought that the gender variable might explain possible within sample differences in attitudes towards tourism in general.

The age of the residents was considered relevant since it was expected to be an important explanatory variable. The literature review suggested that younger people, with more qualifications, tend to be more favourable towards tourism.

The educational qualification was similarly important because it was considered to have a strong power on the attitudes toward tourism. As a consequence was assumed being a good explanatory variable.

The tourism qualification was inserted because it was thought that the more tourism qualifications the more positive the attitudes of the respondents.

The occupational variable Q7.1 was included for relating employment status and attitudes. The occupational variable was found in other studies as being predictor of attitudes towards tourism.

Question 7.2 living through tourism was fundamental for relating those jobs dependent from tourism to more positive attitudes in relation to social impacts and consequences of tourism.

Finally, the variable family links with tourism was included because it was hypothesised that those with family related with tourism would have more positive attitudes than those whose family was not related with tourism.

Some strategic decisions were made. First the examination of several types of correlations alerted the research to the positive expansion of the underlying structure in the data set. To this end, the decision was taken to better explore the instrument with factor analysis, searching more factors than the nominated constructs: tourists, tourism economic impact and future actions or other different structure of the factors.

Secondly two of knowledge questions Q1 as tax revenue and Q3 on employment generated by the tourism industry were collapsed in two groups. Group one 11-25% was considered to be the group with accurate knowledge and group two were all the others who were not considered to have accurate knowledge.

Thirdly several demographic variables were introduced such as educational studies in tourism, contact with tourists, business related tourism, and family relation with tourism, due to their expected explanatory power, as mentioned before.

Finally, last but not the least, residents' attitudes towards tourism and its role as a development tool were included in this study. These variables were measured by examining resident's views about support of tourism by Government, Government role in encouraging the growth of tourism and importance of increasing the demand for tourism. Here the outcome of the changes(s) brought about by changes in an independent variable is important.

6.8 Forms of Analysis

6.8.1 Data Input

As mentioned before, the returned questionnaires, after the field work, were numbered and the data collected were imported in SPSS software and Formic. Computers primarily help by saving labour. As Kumar (1999, p.224) puts it: 'Their application in handling complicated statistical and mathematical procedures, word processing, displaying and graphic presentation of the analysed data save time and increase speed'. On the other hand Formic is a powerful software tool for the design and processing of surveys. It offers facilities such as:

- The design and production of forms for surveys;
- The quick capture of data from survey forms; and
- Processing and exporting the recovered data.

6.8.2 The Major Statistical Methods Applied

Due to the quantitative dimension of the research, a large amount of data was collected from the implementation of the research instrument. The application of statistical methods depends upon the purpose of the research. They help to make sense of the data, explore

relationships and interdependence between variables, 'ascertain the magnitude of an existing relationship or interdependence and place confidence in findings' (Kumar, 1999, p.224).

The major statistical methods used for the data analysis (Tabachnik and Fidel 1996; Tull and Hawkins 1993) are summarised in the following section:

1. *Descriptive Statistics*

Descriptive statistics are used to measure the central tendency (mean) and the measure of dispersion (standard deviation, range, variance).

2 *Statistical Analysis*

a) Pearson product-moment correlation

This method quantifies the linear relationship between a pair of variables. It is particularly useful for examining the consistency of the items that are used to represent the nominated areas or dimensions.

b) Independent Sample t-Test

This is applied to test the equality of the means of two populations. The method is appropriate when there are only two samples to be compared. In other words, the test is applied to test the null hypothesis that the data were from a population in which the mean of the variable in question was equal in two independent samples.

c) One-Way Analysis of Variance (One- Way ANOVA)

This tests the hypothesis that the sub-samples belong to the same population when there are more than two sub-samples or groups. In other words, the technique is applied to test the difference between the means when there are more than two groups.

d) Factor Analysis

Factor analysis is a type of procedure for investigating the structure of the correlations or covariances between the variables in a set of multivariate data. To quote Everitt and Wykes (1999, p.64): 'Essentially the aim is to discover whether the correlations arise from the relationships of the observed or manifest variables to a small number of underlying,

unobservable, latent variables, usually known in this context as the common factors’.

In order to justify or not the existence of the four dimensions of attitudes towards tourism, the data were subjected to exploratory factor analysis (Child 1970; Howell 1992; Hair et. al., 1998).

e) **Scale Analysis**

A number of methods are used for the examination of the scale dimensions. Mainly, the statistical methods search the reliability and validity of the scale as a series of items.

Scale mean if item deleted: the average value for the scale is computed without the particular item under examination.

Corrected item-total correlation: the Pearson Product Moment correlation coefficient between the items under examination and the sum of the other items are computed.

Cronbach’s Alpha: was used to measure the internal consistency of the scale. The score represents the true variance given to the measured construct. In addition it is considered of paramount importance for the evidence of the reliability of a scale.

Alpha if item deleted: the alpha value without the item under consideration is also computed to measure the item effect on the reliability of a scale.

6.9 Conclusion

The chapter has emphasised the methods employed in the research. It has shown a need for quantitative techniques accepting the contributions of qualitative ones.

The chapter has also outlined some theories and their eventual usefulness for an attitude model conceptualisation.

The chapter has also discussed the research process and options and has presented the development of the questionnaire and its various stages.

Finally the chapter highlights some research methods conducting to research findings.

CHAPTER 7

FINDINGS

7.1 Finding of the Study: Primary Data

Chapter 7 provides information about findings of this research study of the attitudes of residents towards tourism in Madeira. The chapter provides information of interest to decision-makers that can be used for strategic planning and development of tourism policy.

The attitude survey of Funchal, Madeira residents was designed to achieve a number of objectives. The objectives were:

- to examine, in a representative way, the attitudes of the resident towards tourism;
- to identify patterns and differences, if any, between residents' attitudes, towards tourism according to several influential factors;
- to provide input to the development of a tourism policy for the island, that includes the views of residents.

This area of tourism research, the attitudes of residents towards the impacts and consequences of tourism, has a considerable relevance because regional, local and national authorities need feedback from residents on what should be done for tourism in the island. Information collected in this study should be representative of the main features of attitudes of residents towards tourism. To this end the study:

- assesses 'for and against' attitudes of residents towards tourism;
- identifies problems experienced by residents as a result of the impact and consequences of tourism;
- examines attitudes for future tourism policy.

The next section lists specifically the research objectives and associated research questions, outlines the background, methodology and findings of the study.

7.2 Research Objectives and Questions

The final research objective is to assess the attitudes of residents' of Madeira towards tourism on the island and to explore their views about tourism policy. In order to arrive at this main objective, 'ancillary' objectives were created. The following research questions and corresponding hypotheses are listed.

Research Question 1

'Are there any underlying dimensions regarding residents attitudes towards the impact and consequences of tourism?'

Null Hypothesis (Ho)

'No underlying dimensions will emerge from the analysis of residents' attitudes towards the impact and consequences of tourism.'

Research Question 2

'Do the residents of Madeira have the same patterns of attitudes regarding the social impact and consequences of tourism?'

Null Hypothesis (Ho)

'The residents of Madeira have different patterns of attitudes regarding the social impact and consequences of tourism?'

Research Question 3

'Is it possible to predict residents' attitudes towards tourism and its consequences according to their knowledge about the importance of tourism?'

Null Hypothesis (Ho)

'It is not possible too predict residents' attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism'

Research Question 4

'Is it possible to predict residents' attitudes towards tourism impacts and its consequences according to their socio-economic and demographic characteristics?'

Null Hypothesis (Ho)

‘It is not possible to predict residents’ attitudes towards tourism impacts and its consequences according to their socio-economic and demographic characteristics?’

Research Question 5

‘Is it possible to predict residents’ support for the development of tourism policy according to their attitudes towards tourism impact and its consequences?’

Null Hypothesis (Ho)

‘It is not possible to predict residents’ support for the development of tourism policy according to their attitudes towards tourism impact and its consequences’

Research Question 6

‘Is it possible to predict residents’ support for the development of tourism policy according to their knowledge about tourism, their attitudes towards tourism and their socio-economic and demographic characteristics?’

Null Hypothesis (Ho)

‘It is not possible to predict residents’ support for the development of tourism policy according to their knowledge about tourism, their attitudes towards tourism and their socio-economic and demographic characteristics?’

7.3 The Sample

This study sought to develop a sample frame which was representative of the residents as a whole, and thus able to provide the opportunity to identify different patterns and attitudes between residents’ tourism knowledge, demographic and behavioural variables. It sought to cover a very wide range of topics, with appropriate detail and ensure representative results, personal interviews were used to collect data from 397 adults at three sampling points across Funchal (freguesias).

A previously developed classification of residential location was used and information was transmitted to the respondents, so that they could make informed judgements about tourism. A large part of the questions therefore aimed to obtain

information about attitudes, demographics, views, behaviour and knowledge which would be representative of the residents as a whole.

The main survey was carried out in Funchal, Madeira, Portugal, during April, May and June of 1999. The selected geographical areas on Funchal, the capital of Madeira, were three administrative units (freguesias): the biggest – S. Martinho, with urban and semi rural population of 21,475; average - S. Pedro, with a urban population of 9,917 and smallest – Se, with a urban population of 3,172. The self-administered structured questionnaires were distributed to residents of these three freguesias, using a random sample based on the electoral register.

7.4 Sample Size

The field work resulted in 397 useable questionnaires, using a structured questionnaire. The time period (April, May, June) was selected because it was close enough to a normal season, for the attitudes of tourism to remain clear. The questionnaire was found, to some extent long, by the residents but interest levels were high and contributed to the high response rate. This might be due, both to revisions following the pilot and the interest in the subject by those living on an island where tourism is an important component of everyday life. The findings support the assumption that Funchal was representative because it is generally accepted that its area and population, constitute a cohesive entity with the same characteristics. For sample size calculations see Chapter 6 on Methodology.

The Funchal survey respondents were taken from the electoral register (ER) of three neighbouring parishes (freguesias). This large sample gave more valid results, though personal interviews with such a large number was both labour intensive and time consuming. An alternative method would be to send the questionnaires via the post to a large number of random addresses picked up from the ER. However, it was found, from contacts with respondents that only a minority of questionnaires would be returned with consequences for the sample and support of findings.

7.5 Sample Characteristics

To gain understanding of residents' demographic characteristics and exposure to tourism a series of questions were asked. Descriptive analysis of the questions follows.

Demographics Questions:

Age Distribution

The profile of respondents reflected closely the age of the population of the Island. The six age groups, targeted in the research instruments were: (1) 15-25, (2) 25-34, (3) 35-44, (4) 45-54, (5) 55-64 and (6) over 65. The majority of respondents (63.6%) were between the ages of 25 and 54. There is a slight age bias in the respondents. According to the 1991 Census, the group of those aged 45-54, (20.8%) were over represented in the sample. The official figure is 9.6%. This may be due to the time of the day, or other reasons, making the sample conservative. The other groups follow the official trend.

Gender

The gender breakdown of respondents (female 58.7% and males 41.3 %) was representative of the actual breakdown of the population (1991) which is reported at the time of the last population census as 53.3 % female, and 46.6% male.

Education Level

The four categories used in the classification of the educational status of the sample were: (1) Less than Full Primary School (less than 4-5 years in school), (2) Primary School, (4-5 years in school), (3) Secondary School (High School), (4) Higher Education. Findings suggest that the most common educational level in the sample is Secondary School, (174 respondents, 44.1 %). These are followed by Less than Full Primary School (81 respondents, 20.5 %). In spite of information collected from official sources, in 1998, where 25 % of the population is currently within the educational system, low levels of education were found. This sample has relatively low levels of education, taking up values of the past.

Tourism Qualifications

The residents were asked whether or not they had any education in tourism. the proportion of respondents with tourism education is low. In effect (38 respondents,

9.6%) had tourism qualifications against (90.3%) of the sample that stated they did not have tourism education, (both training and education). When asked the same question 2, declined to answer.

Occupational Status of Respondents

Residents were asked to indicate their job status. The majority of the respondents (196 respondents 49.9%, had full-time employment. Part-time employees and students account for (72 respondents, 18.4%) of the sample.

Living Through Tourism

Residents were asked if they earn their living through tourism. The number whose job was and percentage of those dependent on tourism were (66 respondents, 16%), against those not tourism related (327 respondents, 83.2%).

Contact with Tourists

Respondents were asked if they have or not contact with tourists as part of their work. Those with contact (127 respondents, 32.3%) have contact with tourists as part of their job, against 226 respondents, (67.7%) declaring having no contact with tourists as part of their job.

Business Related to Tourism

On business related with tourism (24 respondents, 6.1%) had a tourism-related business, against (369 respondents, 93.9%) who did not.

Family Links with Tourism

Respondents were questioned if they have or not family related with tourism. The results were as follow: those residents with family related with tourism 189 respondents, (48.3%) against those 202 respondents, (51.7%) whose family were not related with tourism.

Knowledge of Tourism Questions:

In order to establish the respondents' level of knowledge about tourism and its role in Madeira they were asked three questions about tourism's economic importance to the island. Those who answered the questions correctly were judged to have

more knowledge accuracy and vice versa. The answers were transformed into dichotomous variables to enable additional analysis of the data.

Tax Revenue

The first question related to the tax revenue generated by tourism. The actual figure is about 25%. The percentage who pointed out between 11% and 25% were considered to have answered the question correctly (41 respondents, 10.7%) against 342 respondents, (89.3%) who were considered not having accurate knowledge. From this it is clear that the residents have an unreliable perception of the importance of tourism as a generator of tax income.

Revenue Producing

The second question related to the revenue produced by tourism. Respondents were questioned if tourism was or not the largest revenue producing industry in the island. It is. Those who said yes (345 respondents, 90%) against 33 respondents, (10 %) saying no, shows that overwhelmingly the residents have accurate perception of the importance of tourism as the main revenue producing sector of Madeira.

Employment

The third question related to the percentage of the employment generated by tourism. The actual figure is about 25%. Again the percentage who indicated between 11% and 25%, were considered to have answered the question correctly (44 respondents, 11.5%) against 338 respondents, (88.5%) who were considered not having accurate knowledge. From this finding it is also clear that the residents have an unreliable perception of the importance of tourism as a generator of employment.

Behavioural Questions:

In order to explore the views of residents towards the development of tourism policy and their views on Governments, it was considered to what extent residents' support tourism development. With this in mind three questions were selected to test the respondents' support for the development of tourism.

Government Support

Residents were asked if legislators should support tourism development efforts in the island. Overwhelmingly, respondents said yes; 351, against 30, who said no.

Encouragement of Tourism Growth

Residents were questioned if the planned expansion to attract more tourists was a good idea. Again, overwhelmingly, those saying yes were 306, versus those saying no, 75.

Further Tourism Expansion

When asked if the planned expansion to attract more tourists to the island was a good idea, 353 of respondents said yes and 27 said no.

The results show strong pro-tourism views from the residents, but with some concerns regarding the type of growth and development.

7.6 Findings on the Resident Attitudes to Tourism

In developing the attitude statements an attempt was made to relate them to four dimensions of tourism: attitude to the tourists themselves, attitudes towards the tourism industry, attitudes towards the economic impact of tourism and attitudes towards future actions related to tourism. To examine the attitudes of residents towards the social impacts and consequences of tourism, 23 Likert scale statements based on a five-point scale were used. The scores were reversed for negative statements. Hence the higher the score the more favourable the attitude towards tourism. As explained later, the reliability of the scale was tested. The general Cronbach's Alpha was .66 and the standardised Alpha .67. This supports the reliability of the scale. The mean scores and standard deviations for the 23 statements on attitudes are shown in Table 7.1.

Statements	Mean	SD
1. As a whole, tourists who come to Madeira are inconsiderate of our island resources	4.018	1.106
2. If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities	3.667	1.226
3. The tourism industry provides many worthwhile employment opportunities for Madeira residents	4.389	.936
4. On the whole, the tourism industry regulates and policies its activities well	3.460	1.004
5. I like most tourists as long as they do not move here to stay	3.704	1.201
6. I believe that tourism in Madeira has cause taxes to go up for Madeira residents because of extra police needs, roads and so on	3.235	1.345
7. I believe that the tourism industry has improved the quality of life in the island	4.091	1.006
8. This island would be a better place if there were no tourists here	4.439	.823
9. The tourists that come to Madeira are usually not very friendly	4.010	1.098
10. The tourists do not pay their 'fair share' for the services provided them	3.651	1.238
11. The tourism industry is good for Madeira's economy	4.465	.875
12. Overall the tourism industry does a good job in supporting the region in which I live	3.639	1.048
13. The tourists I have seen in our shopping malls and stores are generally rude and pushy	4.185	1.021
14. I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use	3.785	1.202
15. I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island	3.737	1.249
16. The tourism industry in our island is too commercialised	2.955	1.236
17. I am in favour of limiting economic growth in the island in which I live	3.473	1.326
18. I feel that Madeira is growing too fast	3.304	1.396
19. Madeira is too dependent on tourism	2.048	1.113
20. The airline connections in Madeira are good because of tourism	3.127	1.250
21. There would be little traffic congestion if not for the tourists	4.168	1.062
22. The tourism industry has too much political influence in the island	2.625	1.180
23. The advertising money spent by the Government and related bodies to attract tourists is a good investment	3.942	1.030

Table 7.1 Means and Standard Deviations for the 23 Statements

When the statements are negative the reversed order of rating should be considered.

1=Strongly agree, 2=Agree,3= Neutral, 4=Disagree,5=Strongly disagree.
Based on pairwise deletion of cases with missing values.

There were standard deviations of less than one for statements numbers three, eight and eleven. This level of analysis, at this stage, suggests that residents show a favourable attitude towards the social impact and consequences of tourism, supporting tourism in general.

The following task was to get an overall measure of the attitudes (+ or -) from each subject. Therefore each row was summarised and compared with the mid score of 69 (23x3), more than 69 means a positive attitude, less than 69 means a negative attitude, 69 was considered neutral. This helps to examine in a representative way the attitudes of residents towards tourism in general.

	Positive Attitude	Neutral	Negative attitude
Attitudes	364	4	19
Mean	3.65		
Standard Deviation	1.12		

n=387

Likert scale 1= very negative 5= very positive

Table 7.2 Overall Attitudes Towards Tourism in Madeira

As shown in Table 7.2 a total of 364 respondents displayed a positive attitude toward tourism with only 19 showing a negative attitude and four with a neutral attitude. Clearly the respondents substantially support tourism. However, a grand mean of 3.65 for the attitude scales shows that overall the positive attitudes are fairly mild. Within this a standard deviation of 1.12 indicates a heterogeneity in the responses that is likely to range from strongly positive attitudes to attitudes which are fairly neutral. This suggests different patterns of responses and attitudes from residents towards the social impacts and consequences of tourism.

To examine patterns of and differences in responses between residents several personal and demographic variables were used to group respondents into sub-samples. These sub-samples provide information required to answer research

question four, ‘is it possible to predict residents’ attitudes towards the impacts and consequences of tourism according to their socio-economic and demographic characteristics?’ Sub-samples also were created for behavioural variables to answer research question five, ‘ is it possible to predict residents’ support of tourism policy according to their attitudes towards tourism impacts and its consequences?’. Lastly, sub-samples were also created for knowledge variables in order to test research question three, ‘is it possible to predict resident attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism?’

Socio Demographic Questions

Gender

	No	Mean	SD
Male	157	3.67	1.1
Female	225	3.60	1.12

n=382

p=0.43

Table 7.3 Male and Female Attitudes Towards Tourism in Madeira

The gender of the residents was asked in order to investigate gender comparisons between males and females regarding possible differences in attitudes towards tourism in general. Table 7.3 provides a breakdown by gender. A mean on the attitude scale of 3.60, indicates that women in Madeira appear to have a slightly less positive attitude towards tourism than men who had an overall mean of 3.67. A t-test reveals no significant differences between the two sub-samples’ mean scores, despite some significance for individual variables. The variables were:

- **Q.17** ‘I am in favour of limiting economic growth in the island in which I live’ (p=.023.)
- **Q.23** ‘The advertising money spent by the Government and related bodies to attract tourists is a good investment ‘ (p=.005).In the former case (Q.17) males scored 3.59 and female 3.39. Men are likely to support more economic growth

than females. In the latter, (Q.23) males scored 4.06 and females 3.86. Overall males are more likely to support a strategy of increasing demand for the island. One possible explanation is that rate of employment in men is higher and men as family breadwinners are more conscious of the contribution of tourism to the economy.

Business Related with Tourism

The topic of **business related to tourism** was examined because it was hypothesised that those with a tourism business would have more positive attitudes towards tourism in general than those without business related with tourism. The results are given in Table 7.4. Most respondents do not have businesses related to tourism. Residents with businesses related to tourism have a very slightly more positive attitude (3.67), than those without a tourism related business, (3.64). A t-test on the overall means indicates no significant differences between two groups ($p= 0.30$). However significant differences were found, again for some individual variables. Those variables were:

- **Q.5** 'I like most tourists as long as they do not move here to stay' ($p= .022$).
Those with business in tourism have a mean of 3.45 for the item against those without business in tourism whom scored 3.71 on the item. Those without business in tourism disagree more with the statement than those related. Perhaps those without tourism related business, view tourists as a potential market for their products and services.
- **Q.7** 'I believe that the tourism industry has improved the quality of life in the island' ($p= .009$).
Those with business in tourism scored 3.83, against those without business in tourism scoring 4.11. Those without business in tourism agree more with the statement than those with tourism business. This might be explained by a generally pessimistic attitude of those engaged in the tourist industry towards the sector that they know best.
- **Q.12**'Overall the tourism industry does a good job in supporting the region in which I live' ($p= .017$).
Those with a business in tourism scored 3.52; those without a business in tourism scored 3.63. Those without business in tourism agree more with the statement than the other ones. Again it seems that those involved in tourism

have a less positive attitude towards the economic benefits of tourism perhaps because they can also see some of the weaknesses of tourism as an economic force.

- **Q.19**'Madeira is too dependent on tourism' ($p = .026$).

Those with business in tourism scored 2.16 and those without business in tourism scored 2.02. Those without tourism related business agree more with the statement than those who are tourism business related. This finding reveals that tourism is more important for those without a tourism business .

Q.23'The advertising money spent by the Government and related bodies to attract tourists is a good investment' ($p = .008$).

Those with business related with tourism scored 4.04 for this statement and those without a tourism related business scored 3.93. Those with tourism related businesses view advertising as a means to increase tourism demand for the island.

	N0	Mean	SD
Business related tourism	22	3.67	1.27
Business not related to tourism	360	3.64	1.11

$n=382$; $p= 0.30$

Table 7.4 Attitudes by Business Orientation in Madeira

In general it seems that respondents support tourism and this support is not related to owning a tourism related business.

Perhaps this finding can be explained by the regional tourism culture . The idea is within the framework of altruistic surplus theory, (and in the spirit of other mentioned theories), which argues that despite not having a direct interest in tourism, residents back the development of tourism for the island as an important tool for global development. Attitudes may change as the industry grows and this should be evaluated in the future.

Additional demographic variables such as **education in tourism (Table 7.5)**, **working in tourism (income, Table 7.6)**, **contact with tourists (Table 7.7)**, and

family employment related with tourism (Table 7.8), were also used to examine the attitudes towards the impact of tourism. They were selected because it was thought that those with education in tourism, working in tourism, having contact with tourists as part of their job, and family employment related with tourism, would more likely to have more positive attitudes towards tourism in general than those without.

Education in Tourism

Table 7.5, shows that there were no significant differences between the general means of the two groups. Again further analysis through t-tests reveals significant differences for some individual variables. Those variables with significant differences between respondents were:

- **Q.8** 'This island would be a better place if there were no tourists here' ($p=.008$).

Those with education in tourism have a mean of 4.34 for the item and those without education in tourism, scored 4.44. It seems that those without education in tourism have a more enthusiastic and friendly admiration for tourists than those tourism educated.

- **Q11**'The tourism industry is good for Madeira's economy' ($p=.000$).

Those without education in tourism agree more with the statement scoring 4.48, than those with education in tourism scoring 4.21 tourism. Those with an educational background in tourism are more likely to be more realist about what tourism adds to Madeira's economy.

Working in Tourism (income related)

There were no significance at all from the t-tests. However Table 7.6 shows that those working in tourism have a mean of 3.74 as opposed to those not working in tourism with a mean of 3.63. Overall this reveals more positive attitudes towards tourism in general for those working in tourism. The standard deviations are respectively 1.05 and 1.23.

Contact with Tourists

Table 7.7 shows that respondents in contact with tourists as part of their job had a mean of 3.72, as opposed to respondents without contact with tourists who had a mean of 3.61. A t-test on the mean between groups showed no significant differences between groups except for two questions. The questions were:

- Q2 'If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities' (p= .032).

Those with contact with tourists as part of their job scored 3.85, while those without contact with tourists as part of their job, scored 3.56. Those with contact with tourists as part of their job were more likely to support the importance of the tourism industry than those without contact with tourists as part of their job. This particular finding confirms the more friendly relationship of hosts contacting directly with tourists. It also suggests that knowledge of and exposure to tourists influence residents' attitudes.

- Q8 'This island would be a better place if there were no tourists here' (p= .009). Those with contact with tourists as part of their job scored 4.57, against 4.37, of those without contact with tourists as part of their job, reveal coherence with the previous question (Q2). In effect those with contact with tourists seem to have a more friendly attitude towards tourists. It seems that those with contact with tourists, as part of their job, have more favourable attitudes towards them than those without direct contact as part of their job. Perhaps job experience influences attitudes.

Family Related with Tourism

Residents whose family work in or own a tourism related business were compared with those whose family did not work or own a tourism related business regarding their attitude towards tourism in general. Table 7.10 shows that those with family related tourism businesses had a mean of 3.62 and those without family related with tourism with a mean of 3.67. The scores were almost identical. T-tests used to compare the two groups showed no significant differences, except for two particular variables. The variables were:

- Q.12 'Overall the tourism industry does a good job in supporting the region in which I live' (p= .046).

Those with families having a tourism related with tourism scored 3.51 for the item against 3.73 for those without family relations. Results indicate that family relations in tourism it is not determinant of attitudes towards tourism.

- **Q.19** 'Madeira is too dependent on tourism' (p= .023).

As a matter of curiosity those family related with tourism scored 4.57 as opposed to those without family related with tourism, scoring 4.37. Those family related with tourism may have more acceptance of tourism as a development tool for the island.

	N0	mean	SD	P
Education in tourism	38	3.71	1.27	0.48
Not education in tourism	355	3.64	1.11	

Table 7.5 Education and Tourism

	N0	Mean	SD	P
Income related	62	3.74	1.05	0.49
Not income related	320	3.63	1.23	

Table 7.6 Working in Tourism (income related)

	N0	Mean	SD	P
Contact with tourists	124	3.72	0.98	0.46
Not contact with tourists	258	3.61	0.97	

Table 7.7 Contact with Tourists

	N0	Mean	SD	p
Family related	184	3.62	1.13	0.38
Not family related	196	3.67	1.28	

Table 7.8 Family Related with Tourism

Age

Age Category	N0 of Respondents	%	Mean	SD
15 24	62	15.7	3.71	1.14
25- 34	80	20.3	3.66	1.12
35 44	89	22.5	3.71	1.10
45 54	82	20.8	3.66	1.03
55 64	44	11.1	3.54	1.15
Over 65	38	9.6	3.51	1.19
Total	395	100	3.63	1.12

Table 7.9 Age Distribution of Survey Participants

The age of residents was selected to explore variations in responses because it was expected to be an important explanatory variable. The literature review suggested that younger people, with more qualifications, tend to be more favourable towards tourism. Thus, age of residents was explored in relation to their attitudes towards the social impacts and consequences of tourism.

Respondents were grouped by age category to examine the attitudes of each category towards the 23 statements on attitudes to tourism. Table 7.9 shows the relationship between age and attitudes to tourism. Two groups of people, those between 15 and 24 years old and the group of 35 - 44, both scored higher than other groups. Those aged over 65 scored less than the other groups. All categories reveal high standard deviations. Two groups, those between 55-64, and those over 65, scored below the general mean of 3.63. According to Census 91, the group of those aged 45 - 54, with the percentage of 20.8% are over-represented in the sample. The official figure is 9.6%. The other age categories follow the general

official trend. Analysis of variance (ANOVA) reveals no significant differences among group mean ($p= 0.3579$). However, two significant differences were found for two individual variables. The questions and the responses were as follow:

- **Q9** ‘The tourists that come to Madeira are usually not very friendly’ ($p= .0044$). Again two groups of young people, those between 15 and 24 years old and the group of 35-44, both scored higher than other groups with mean scores respectively of 4.19 and 4.22. However those between 45-54 score 4.08; those between 25-34 score 4.01. Older people, score less, with those between 55-64, scoring 3.56 and those over 65 scoring 3.65. From the finding, younger people disagree more with the statement than older people. This suggests more acceptance from younger generation towards tourists, mixing and socialising, more than from the older generations.
- **Q.21** ‘There would be little traffic congestion if not for the tourists’ ($p= .0056$). Again all groups disagree with the statement, categorically, with a mean of 4.17 for all age groups. They do not consider tourists as responsible for traffic congestion. The finding is consistent with the fact that Funchal, the capital is already considered a traffic problem city. Those aged 35-44 scored 4.32; those between 25-34, score 4.29 and both groups those between 15-24 and 45-54 scored the same, 4.24. Older people disagree less with the statement and had a mean of 3.95 for those between 55-64 and a mean of 3.60 for those over 65. This last group includes older people, perhaps without much experience of driving and that may explain influence on their attitudes.

Education Level

Category	N.of Respondents	%	Mean	SD
Less than full primary school	81	20.5	3.52	1.12
Primary school	77	19.5	3.64	1.11
Secondary school	174	44.1	3.67	1.11
Higher education	62	15.7	3.66	1.14
Unrecorded	1	.3	3.66	
Total	395		3.62	1.12

Table 7.10 Education Level

The educational level was chosen because it was considered from the literature to have a strong influence on attitudes towards tourism

Residents were grouped by education level to establish the relationship between educational background and attitudes towards tourism. Results are shown in Table 7.10. Results indicate that those with secondary school and higher education, had mean scores of 3.67 and 3.66, and more positive attitudes towards the social impacts and consequences of tourism than those with less than full primary school, 3.52, and primary school of 3.64. From the results, those with higher levels of education have more positive attitudes towards tourism than those with low levels of education. However, analysis of variance (ANOVA) reveals no significant differences among the means of the groups ($p= 0.2419$). However significant differences were found for three individual variables of the data set. The variables and the responses were as follow:

- **Q.6** 'I believe that tourism, in Madeira has caused taxes to go up for Madeira residents because of extra police needs, roads and so on.' ($p= .0055$).

The total mean score for the item is 3.23 which is almost neutral. Those with higher education disagree more than the other groups with a score of 3.82; those with primary school score 3.21; and those with secondary school score 3.13. The lowest score was for those with less than full primary school with

the mean of 3.03. Again those with higher education may be influenced by better salaries and education about the tax problems disagree more with the statement.

- **Q.20** 'The airline connections in Madeira are good because of tourism' (p=.0070)

Those with higher education with a mean of 2.87 and those with secondary education with a mean of 2.96 disagree more with the statement. Those with primary school with a mean of 3.46 and those with less than primary school with a mean of 3.33 agree more with the statement. In fact the airline connections in Madeira are not considered adequate by the population due mainly to the lack of some important flights and due to infrastructure problems such as the weaknesses of the runway not permitting several types of planes with larger capacity. There is a general consensus that the airport of Funchal is a difficult airport. The mean of 3.23 reveals a low level of agreement with the statement.

- **Q.21** 'There would be little traffic congestion if not for the tourists' (p=.0006).

The grand mean for the statement of 4.12 for all educational levels indicates that they disagree with the statement, not considering tourists as responsible for traffic congestion. Again those with better levels of education disagree more with the statement, with the score of 4.50 for those with higher education and 4.30 for those with secondary education, eventually those experiencing more directly the traffic congestion issue. However the score of 3.92 for those with primary school and 3.88 for those with less than the primary school indicate that problems of traffic congestion are not caused by tourists. **Table 7.10** shows that those with low levels of education (less than full primary school and primary school) account for 40% of the sample.

Occupational Status

Category	N0 of Respondents	%	Mean	SD
Full time employment	196	49.9	3.70	1.06
Part time employment	36	9.2	3.73	1.09
Student	36	9.2	3.69	1.11
Unemployment	18	4.6	3.54	1.10
Pensioner	41	10.4	3.52	1.18
Housewife /Husband	46	11.7	3.57	1.16
Other	20	5.7	3.45	1.26
Total	393		3.60	1.13

Table 7.11 Occupational Status of Respondents

The occupational variable was included in this study because other studies found it to be a determinant of attitudes of residents towards the social impact and consequences of tourism.

Residents were categorised by occupational status to explore the relationship between job status and attitudes towards tourism. Results are shown in Table 7.11. Analysis suggests that those working both on a full- time or part- time basis, had mean scores of 3.70 and 3.73, and students, had a mean score of 3.69. These three groups have more positive attitudes towards tourism than other groups. Moreover, all categories show high standard deviations. Again, Analysis of Variance (ANOVA), in general, indicates no significant differences within groups, ($p=0.2928$). However, analysis on individual variables reveals some significant differences for some variables. The variables were:

- **Q.1** ‘As a whole, tourists who come to Madeira are inconsiderate of our island resources’ ($p= .0024$).

The grand mean for the statement is 4.01 which indicates a general disagreement. The results suggest that students with a mean score of 4.19; full-

time employed, with a mean score of 4.18; and part-time workers, the same score, disagree more with the statement. The level of disagreement for other occupational groups is 3.82 for housewife/husband, for pensioners 3.60, for unemployed 3.50 and other groups 3.57. The groups of those working and studying consider tourists more environmental friendly than other residents. As a matter of curiosity, some literature contends that residents are more inconsiderate of resources than tourists.

- **Q.5** 'I like most tourists as long as they do not move here to stay' ($p = .0057$).
A general mean score of 3.70 shows a level of disagreement among all the respondents. However, those employed in full-time with the mean of 3.85, those employed in part-time with the mean of 3.77 and students with the mean of 3.88 disagree more than other groups. From the results can be concluded that residents do not see tourists as negatives in the community. The other groups of respondents disagree less with the statement. In effect unemployed scored 3.55, which can be seen as some fear of competition in the job market; pensioners score 3.04, which may indicate a more sensitivity to the home land; housewife/ husband score 3.50 and other groups score 3.68. From the finding, residents overall welcome tourists.

Q.9 'The tourists that come to Madeira are usually not very friendly' ($p = .0010$).

The general mean of 4.01 for the statement indicates a high level of disagreement. As a consequence tourists that come to Madeira are seen as friendly. Again three groups emerge. Students scoring 4.30; part-time employed with 4.27 and full-time employees with 4.09. From the finding, active population and students reveal more understanding and friendship towards tourists. For the same statement housewife/ husband score 4.00; other groups 3.94; pensioners 3.53 and unemployed 3.27. These four groups have less contact with tourists than those working and studying. Students in Madeira usually work in summer, having also contact with tourists.

Q.11 'The tourism industry is good for Madeira's economy' ($p = .028$);

This is a 'bread and butter' issue and there is a high mean of 4.46 for the statement. Again those working full-time, with a mean of 4.61, those working part-time, with the mean of 4.44, reveal more awareness of the importance of

tourism to Madeira economy. In this case students score 4.33 and pensioners, may be including *ex workers* in tourism, score 4.34. Housewife/husband score 4.30, other 4.10 and even unemployed reveal a good level of acceptance of tourism scoring 4.16. From the finding there is a general consensus about the economic benefits of tourism to the island.

- **Q.17** 'I am in favour of limiting economic growth in the island in which I live' (p=.0172).

The general mean for the item of 3.48 reveals both that in general, occupational groups disagree with the statement, but the level of disagreement is not too high. Students, whose levels of expectancy regarding the job market are high reveal a level of disagreement of 3.72. Part-timers score 3.61 and full-time employees score 3.58. Unemployed score 3.38 which indicates a low level of disagreement; pensioners, not benefiting directly from tourism are more likely to disagree, with a score of 3.56; housewife/husband disagree to some extent scoring 3.06 and other groups scoring 2.63, agree with growth limitation. The groups that tend to disagree more with this statement may benefit directly from economic growth.

- **Q.18** 'I feel that Madeira is growing too fast' (p= .0018);

Curiously the general level of disagreement is low with the mean of 3.29 for the item. Residents in general seem to associate the need for growth with jobs and businesses opportunities. Students score 3.83 being the highest score of disagreement, may be due to their job expectancy. Unemployed score 3.72 which is coherent with their situation in the job market. Pensioners score 3.02, housewife/husband 3.11 and other groups 2.26. Those employed in full-time score 3.38 and those in part-time 3.19. These two last groups seem to be conservative towards the speed of growth which may reflect their satisfaction with their situation. This item and the last provide insights on residents' attitudes towards the development tourism policy to the island.

- **Q.20** 'The airline connections in Madeira are good because of tourism' (p=.0394);

This is a positive statement and the general mean is 3.15, which can be considered as low agreement. As mentioned before the airline connections to

Madeira are seen as a handicap. Full-time employees score 3.07, part-time 3.22 and students 2.63. However unemployed scored 3.11, pensioners scored 3.26, other scored 3.21 and housewife/ husband scored 3.60. Employment situations may influence attitudes.

- **Q.21** 'There would be little traffic congestion if not for the tourists' ($p = .0037$). Results showed that tourists were not considered responsible for traffic congestion with a general mean of 4.17. However there was a high level of disagreement among groups. Unemployed scored 4.31; part-time employees scored 4.22 and students scored 4.19. Perhaps this result may be explained by the fact that working respondents had more experience during key traffic times (both full-time and part-time employees). Pensioners scored 3.70, housewife/husband scored 3.77 and other groups scored 4.27. As said before, tourists are not considered by residents as traffic congestion agents.

Behavioural Questions

In order to explore the views of residents towards the development of tourism policy and their pressure on the Government, as well as to provide an input to the development of a tourism policy to the island, it was considered to what extent residents support tourism development. Three aspects were examined. They were:

- Government support for tourism development;
- Government encouragement of tourism growth;
- Attitudes to further tourism expansion.

	No	Mean	SD	p
Support of Tourism Development				
Yes	351	3.68	1.05	0.30
No	30	3.34	1.19	
Encouragement of Tourism Growth				
Yes	306	3.69	1.12	0.36
No	75	3.49	1.21	
Attitudes to further Tourism Expansion				
Yes	353	3.67	1.10	0.28
No	27	3.37	1.27	

n= 381; 381; 380

Table 7.12 Attitudes about Tourism in Madeira by Views Towards Government Support

Results in Table 7.12 are self-explanatory and show overwhelmingly resident support for the development of tourism, for government encouragement of tourism growth and views about planning tourism expansion. Not surprisingly, those in favour of further tourism development had more positive attitudes towards tourism. T-Tests revealed the differences between support of tourism development, encouragement of tourism growth and attitudes to further tourism expansion were not significant. However for some individual variables there were significant differences.

Support for Tourism Development

The questions with significant differences follow:

- **Q.3** ‘The tourism industry provides many worthwhile employment opportunities for Madeira residents’ (p= .021).
Those saying yes scored 4.44 against those saying no to the item with the mean score of 3.96. Those who say yes seem being more conscious of tourism as job creator than those whom do not back tourism development.
- **Q.7** ‘I believe that the tourism industry has improved the quality of life in the island’ (p= .001).

Those saying yes to development support scored 4.16 on the item against those saying no for development support, with the score of 3.28. Again as expected those who said yes had more acceptance of tourism as a trigger for the quality of life in Madeira.

- **Q.8** 'This island would be a better place if there were no tourists here' (p=.007).

Those saying yes to the development support scored 4.16 against those saying no scoring 4.12. As expected those saying yes disagree more with the statement, meaning their strong support of tourists.

- **Q.11** 'The tourism industry is good for Madeira economy' (p=.001).

Those saying yes to development support scored 4.53 on the item against those saying no with the score of 3.68. Again as expected those who said yes recognise more clearly the importance of tourism for Madeira economy than those saying no.

- **Q.13** 'The tourists I have seen in our shopping malls and stores are generally rude and pushy (p= .000).

Again those saying yes to development support scoring 4.23 on the statement, disagree more with the statement than those saying no, with the score of 3.65 in the consideration of tourists as polite and not rude and pushy.

- **Q.19** 'Madeira is too dependent on tourism' (p= .001).

Those saying yes to the question of development support of tourism scored 2.01 on the item and those saying no scored 2.37. Those saying yes agree more with this item considering the excessive dependence of the island from tourism.

- **Q.23** 'The advertising money spent by the Government and related bodies to attract tourists is a good investment' (p= .044).

Those saying yes to the support of tourism development question scored 4.00 on the item against those saying no with 3.31. This reveals a coherent attitude

relating those saying yes towards the item on increase of tourism demand to the island, backing more than the other group, the importance of tourism.

Encouragement of Tourism Growth

The questions with significant differences were:

- **Q.2** 'If it was not for the tourism industry, the island could not support many of its cultural facilities'(p= .021).

Those saying yes to the question of the encouragement of tourism growth scored 3.68 on the item as opposed as those saying no who scored 3.55. Those saying yes support more this positive statement about the importance of tourism as cultural amenities creator.

- **Q.7** 'I believe that the tourism industry has improved the quality of life in the island' (p= .007).

Those who said yes, to the question of the encouragement of tourism growth, had a score of 4.17 on this positive statement and those who said no, had a score of 3.74 for the same statement. The results show that those backing encouragement of tourism growth agree more with the statement on tourism as a tool for quality of life in Madeira.

- **Q.18** 'I feel that Madeira is growing too fast' (p= .009).

Those who said yes to the question on encouragement of tourism growth had a score 3.37 and those who said no had a score of 3.02. Those saying yes for encouragement of tourism growth also disagree more with the statement that considers that Madeira is growing too fast showing more acceptance for further growth.

- **Q.23** 'The advertising money spent by the Government and related bodies to attract tourists is a good investment'(p= .044).

Those who said yes for encouragement of tourism growth question had a score 4.00 on this positive statement and those who said no on the question of encouragement of tourism growth had a score of 3.65. Those saying yes support more the tactic of Government for increasing demand to the island.

Planned Expansion to Attract more Tourists

The questions with significant differences were

- **Q.2** 'If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities' (p= .008)

Those who said yes for the question of increasing tourism demand to Madeira had a score 3.65 on the item on attracting more demand and those who said no had a score of 3.62 on the item. Those saying yes for increasing tourism demand also support more the idea of tourism as the main creator and beacon of amenities in the island.

- **Q.3** 'The tourism industry provides many worthwhile employment opportunities for Madeira residents' (p=.019).

Again as expected those who said yes to the question of planned expansion for attracting more tourists had a score of 4.39 and those who said no had a score of 4.17 support more the idea of tourism as job creator for residents of the island.

- **Q.11** 'The tourism industry is good for Madeira's economy' (p= .012).

Again the 'bread and butter ' issue receives good scores. In effect those who said yes to the question of increasing demand had a score of 4.48 and those who said no had a score of 4.10. The results are self-explanatory. Those saying yes scored more than those saying no, but both groups show high positive attitudes, regarding the importance of tourism for Madeira economy.

- **Q.15** 'I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island' (p=.041).

Those supporting increase in demand had a score of 3.76 on the item and those who said no, had a score of 3.51. This reveals more disagreement with the statement on more taxation on tourism trade than upon other sectors, from those who said yes to the 'increasing demand' question.

- **Q.21** 'There would be little traffic congestion if not for the tourists' ($p=.011$). Those supporting increase in tourism demand scored 4.21 on the item and those who said no had a score of 3.75. Those who said yes also consider more than the others who said no that tourism is not responsible for traffic congestion, disagreeing more with the item.
- **Q.23** 'The advertising money spent by the Government and related bodies to attract tourists is a good investment' ($p = .004$). Those who said yes on the question on increasing demand scored 3.95 on the item and those who said no had a score of 3.65. As expected those supporting increase in tourism demand agree more with the statement about the tactic for attracting more tourists, than those who said no.

Research Question five asked:

'Is it possible to determine residents' support of tourism policy according to their attitudes towards tourism social impacts and its consequences?'

The Null Hypothesis was: 'it is not possible to determine residents support of tourism policy according to their attitudes towards tourism impacts and its consequences'.

From the findings it is not possible to reject the null hypothesis because the between group differences were not significant

However some indicative trends do exist with connections and associations between independent and dependent variables. This should be examined in future studies.

Knowledge Questions

Accuracy of the resident's knowledge about tourism and its economic importance was thought to be an explanatory variable in relationship to residents' attitudes towards the social impact and consequences of tourism. Three variables were used

to test the respondents' knowledge of tourism and its economic importance and relating residents' attitudes towards tourism with their knowledge about it.

To determine whether or not respondents had an accurate knowledge about the importance of tourism in Madeira they were asked to indicate its contribution to tax revenues, employment and to overall revenue. The responses for the first two were then collapsed into two categories representing accurate and inaccurate knowledge about contribution to tax revenues and employment, to reveal the level of awareness of the contribution of tourism to tax revenues and employment generation. Results are shown in Table 7.13 and indicate a low level of accuracy in their awareness.

As far as tax revenues are concerned, the majority of respondents do not have an accurate awareness. Further analysis relating to attitudes towards tourism reveals that those with accurate awareness are not more in favour of tourism. Although these results are not statistically significant they suggest that positive views of tourism on the island are based on poor knowledge.

	N0	Mean	SD	%	p
TAX REVENUE					
Accurate	41	3.59	1.08	10.7	0.48
not accurate	342	3.66	1.13	89.3	
REVENUE PRODUCING					
YES	345	3.66	1.11	90	0.32
NO	33	3.57	1.23	10	
EMPLOYMENT					
Accurate	44	3.57	1.06	11.5	0.42
Not accurate	338	3.66	1.13	88.5	

n=383; 378; 382

Table 7.13 Knowledge of the Relative Importance of Tourism in Madeira

Additional descriptive analysis was completed to determine if there were differences between those who consider and those who do not consider tourism as a major revenue producer for the island. The attitudes of those who believe tourism is a major revenue sector for Madeira produced a grand mean of 3.66, in contrast to those who do not believe tourism is a major contributor with 3.57.

T-tests on the mean were conducted to determine if there were significant differences between those who were aware and those who were not aware of tourism as a tax revenue generator and those who consider or not the tourism industry as the largest revenue producing activity on the island. The results of the t-tests for the former and the latter, respectively $p=0.48$ and $p=0.32$ indicate that no significant differences were found. However for individual variables significant differences were found. The variables were:

Tax Revenue

Q.7 'I believe that the tourism industry has improved the quality of life in the island' ($p= .002$).

Those who were aware of tourism as the major tax revenue producer scored 3.64 on the item, those who were not aware of tourism as the major tax revenue producer, scored 4.14. Those with an accurate knowledge about the importance of tourism as the major tax revenue producer do not consider more than those who do not reveal accurate knowledge of tourism as the major tax revenue producer, that tourism improved the quality of life in the island. This may be explained by the fact that those with inaccurate knowledge reveal a not very realistic attitude about the importance of tourism. There is a tendency for overestimating the economic importance of tourism in the island.

Revenue Producing

The questions and responses were as follow

- **Q.2** 'If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities' ($p= .021$)

Those with an accurate knowledge of the tourism as the largest revenue producer scored 3.79, agreeing more on the item, than those with inaccurate knowledge of tourism as the major revenue producer who scored 3.21. As a consequence the first group agree more with the statement of tourism as a big tool for the creation of amenities in the island.

- **Q.5** 'I like most tourists as long as they do not move here to stay' (p=.0030)

Those with accurate knowledge of tourism as the major revenue producing scored 3.78 those with inaccurate knowledge scored 3.15. The first group disagree more with the statement, being less concerned with the eventual long stay of tourists.

- **Q.9** 'The tourists that come to Madeira are usually not very friendly' (p=.016)

Those with accurate knowledge scored 4.08. Those with an inaccurate knowledge had a score of 3.62. The first group disagrees more with the statement revealing a more favourable attitude to tourists than those with inaccurate knowledge.

- **Q.15** 'I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island' (p=.038).

The group with accurate knowledge scored 3.79. Those with inaccurate knowledge scored 3.32. The first group reveals a stronger opposition to the item that would penalise more the tourism sector than other sectors of the economy.

- **Q.17** 'I am in favour of limiting economic growth in the island in which I live' (p=.041).

Curiously those with inaccurate knowledge, scored 3.91. Those with accurate knowledge scored 3.42. This suggests that those with accurate

knowledge are more conscious about the limits to growth, revealing a more favourably point of view in sustaining growth and development rates.

- **Q.19** 'Madeira is too dependent on tourism' (p=.46).

Those with accurate knowledge of tourism as the largest revenue producer scored 2.01, and agree more with the statement than the other group that scored 2.41. This may be explained by the fact that those with more accurate knowledge are also more conscious of the need for diversification in the economy.

Employment

As far as employment is concerned, only 44 respondents reported accurate knowledge of tourism as employment generator in contrast to the 338 respondents with an inaccurate understanding. Again those with inaccurate knowledge reveal a more positive attitude toward tourism. Again there is no overall statistical significance (p=0.42) with exception for an individual variable. It is:

- **Q.7** 'I believe that the tourism industry has improved the quality of life in the island' (p= .006).

The group with accurate knowledge about tourism as employment generator scored 3.72, on the item quality of life produced by tourism, and the group with inaccurate knowledge of tourism as employment generator scored 4.15. There seems to be a general consensus about the importance of tourism in creating jobs and this is not related to accurate or inaccurate knowledge of tourism as employment generator

To summarise:

Research question three asked:

'Is it possible to determine residents' attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism?';

The null hypothesis was:

‘It is not possible to determine residents’ attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism’.

The findings reveal that the null hypothesis cannot be rejected because statistical analysis revealed no significant differences between groups. Thus it is not possible to determine residents’ attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism. However some connections and indicative trends are accepted for a few variables.

7.7 Other Findings on the Resident Attitudes to Tourism

In developing the attitude statements an attempt was made to relate them to four dimensions of tourism. It was hypothesised that behind the attitudes of residents towards tourism in general there is an underlying structure which can be detected by using adequate statistical methods and procedures. The four dimensions are: attitudes to the tourists themselves, attitudes towards the tourism industry, attitudes towards the economic impact of tourism and attitudes towards future actions related to tourism. These four dimensions or constructs are given in Table 7.14

It was recognised that the four dimensions are not mutually exclusive but they could provide a platform for further understanding the patterns and structures of attitudes .The means and standard deviations of the attitudes grouped by the four dimensions or nominated constructs are given in Table 7.15.

Statements	Proposed attitude orientation
1. As a whole, tourists who come to Madeira are inconsiderate of our island resources.	Tourists
2. If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities.	Tourism industry
3. The tourism industry provides many worthwhile employment opportunities for Madeira residents.	Economic impact
4. On the whole, the tourism industry regulates and policies its activities well.	Tourism industry
5. I like most tourists as long as they do not move here to stay.	Tourists
6. I believe that tourism, in Madeira has cause taxes to go up for Madeira residents because of extra police needs, roads and so on.	Tourism industry
7. I believe that the tourism industry has improved the quality of life in the island.	Tourism industry
8. This island would be a better place if there were no tourists here.	Tourists
9. The tourists that come to Madeira are usually not very friendly.	Tourists
10. The tourists do not pay their 'fair share' for the services provided them.	Tourists
11. The tourism industry is good for Madeira's economy.	Economic impact
12. Overall the tourism industry does a good job in supporting the region in which I live.	Economic impact
13. The tourists I have seen in our shopping malls and stores are generally rude and pushy.	Tourists
14. I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use.	Future actions
15. I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island.	Future actions
16. The tourism industry in our island is too commercialised.	Tourism industry
17. I am in favour of limiting economic growth in the island in which I live.	Future actions
18. I feel that Madeira is growing too fast.	Future actions
19. Madeira is too dependent on tourism.	Future actions
20. The airline connections in Madeira are good because of tourism.	Tourism industry
21. There would be little traffic congestion if not for the tourists.	Tourists
22. The tourism industry has too much political influence in the island.	Tourism industry
23. The advertising money spent by the Government and related bodies to attract tourists is a good investment.	Economic impact

Table 7.14 Twenty Three Statements and Nominated Areas

Overall examination of the mean scores for the four constructs (Table 7.15) indicates that residents have favourable attitudes towards tourism. However, attitudes towards the tourism industry, were slightly positive 3.30 with standard deviations of 1.136 and 3.26 for future actions and a standard deviation of 1.497. Clearly the respondents substantially support tourism. However, a grand mean of 3.65, as presented in Table 7.2, for the constructs shows that overall the positive attitudes are fairly mild. Within this a standard deviation of 1.12 indicates a heterogeneity in the responses that is likely to range from strongly positive attitudes to attitudes which are fairly neutral

Areas	Mean	SD
Tourists	4.025	1.078
Industry	3.308	1.136
Economic impact	4.108	0.972
Future actions	3.26	1.497

Table 7.15 Mean and standard deviations for the four areas or nominated constructs

As said before the respondents were asked to rate on a 5- point Likert scale their degree of agreement or disagreement with the 23 statements describing possible attitudes towards tourism in general. The coding of the scale was carried out in the following way: for positive statements: 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, 5=Strong Agree and for negative statements: 1=Strongly Agree, 2=Agree, 3=Neutral, 4=Disagree, 5=Strongly Disagree .

7.7.1 Reliability Analysis - Cronbach's Alpha

The reliability of the scale used was of paramount importance. As a consequence the relationship between the scale and the items have been assessed.

Reliability can be considered in two ways. Firstly, it is the proportion of the variance explained by the true score of a latent variable. As a consequence, the unexplained part of the variance is the proportion of error. Therefore, the less the

data has error the more it is reliable (De Vellis 1991; Ekinçi 1999). This definition also implies that a set of statements is being selected in representing the construct. On the other hand, reliability is not an absolute concept, but estimation. In effect the performance of each item may be different and some improvement may be convenient. In order to assess the optimum set of statements which lead to an increase in the reliability of a scale a process named 'item analysis' is employed (Oppenheim 1996; Ekinçi 1999).

Secondly, reliability can be considered as reproducibility. Assuming that the construct under examination does not change between tests, a reliable instrument should give the same scores in different situations. Therefore, it is the capacity of statements to continue representing the construct when re-tested (Ekinçi, 1999).

Several methods exist to examine the scale reliability: test-retest, parallel test form, internal consistency (Oppenheim, 1996). Churchill (1997) suggests that 'Coefficient Alpha' (Cronbach, 1951) which aims to test the internal consistency of the items of a scale, should be the main tool for assessing reliability

In this study the internal consistency among each of the items within each of the four nominated areas or constructs was tested. This was achieved by computing Cronbach's coefficient alpha's for the four constructs. The internal consistency per construct was:

- tourists (.69);
- industry (.35);
- economic impact (.54);
- future actions (.52).

The general Cronbach's alpha was (.66) and the standardised alpha was (.67), which support a satisfactory guarantee of the reliability of the scale used, which is acceptable for this type of analysis (Schaw, 1996). As a consequence this is an important stage, as the results will establish the support in the later stages of the

research. The findings suggest that the items used belong to the domains to which they were assigned, and the scale was internally consistent.

7.7.2 Examination of Factor Model Adequacy

A. Correlations

A preliminary step in the examination of the factor model adequacy was to examine the correlation matrices. Correlation is a broad term for interdependence between pairs of variables and correlation coefficient is 'an index that quantifies the linear relationship between a pair of variables' (Evaritt and Wykes, 1999, p.44). The coefficient used was Pearson's product moment correlation, where those questions which correlate at a level of 0.3 or -0.3 or above were selected for inclusion, as having significant correlations and thus relevant associations. A satisfactory correlation was necessary for supporting a factor solution and a factor model adequacy 'where a high correlation indicates the existence of common factors' (Szivas, 1997,p.231). To support usage of factor analysis the following correlations were made :

- item to total;
- within nominated constructs;
- between constructs.

Item to Total

Variables of the nominated construct relating **attitudes to tourists** are as follows:

- Q.1** 'As a whole, tourists who come to Madeira are inconsiderate of our island resources' ($r = .3481$)
- Q.5** 'I like most tourists as long as they do not move here to stay' ($r = .4258$)
- Q.8** This island would be a better place if there were no tourists here' ($r = .3859$)
- Q.9** 'The tourists that come to Madeira are usually not very friendly' ($r = .5050$)

Q.10 The tourists do not pay their 'fair share' for the services provided them' (r = .4792)

Q.13 The tourists I have seen in our shopping malls and stores are generally rude and pushy' (r = .3943)

Q.21 'There would be little traffic congestion if not for the tourists' (r = .3316)

The above variables, as far as attitudes towards tourists are concerned, represent a underlying structure of attitude orientation towards tourists and therefore it was expected that they would correlate with each other. The fact that they have the highest correlations indicates the 'positiveness' of resident attitudes towards tourists. Furthermore for this construct relating attitudes to **tourists**, all variables correlate at level 3 or -3 or above which indicates an instrumental utility in the measure underlying structure of attitudes towards tourists. Another construct studied was attitudes of residents towards the **tourism industry**. In order to do that, 7 variables of the questionnaire were selected. When correlated with the total score minus the question score, no relevant correlation emerged. The levels do not qualify for the criterion of 0.3 or -0.3 or above, and thus were not included in the analysis.

The construct relating to attitudes to **economic impact of tourism** also was considered. Economic impact was explained by 4 variables. When the column of scores for each question was correlated with the total score minus the question score this allowed 3 variables to be included in the analysis. The variables were:

Q.3: 'The tourism industry provides many worthwhile employment opportunities for Madeira residents' (r = .3788)

Q.11: 'The tourism industry is good for Madeira's economy' (r = .3172)

Q.23 The advertising money spent by the Government and related bodies to attract tourists is a good investment' (r = .3597)

It is worth to note that the above variables deal with 'bread and butter issues,' forming an underlying structure. The variable Q12 of the construct did not qualify according the criterion used.

On the other hand the nominated construct related to attitudes to **future actions regarding tourism**, constituted by five variables, qualifies four of them; one of level .4 and three at level .3. The variable Q.19 did not qualify. They are:

Q.14 'I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use' ($r = .3166$)

Q.15 'I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island' ($r = .3149$)

Q.17 'I am in favour of limiting economic growth in the island in which I live' ($r = .3568$)

Q.18 'I feel that Madeira is growing too fast' ($r = .4183$)

These four variables, are policy related and have an underlying structure or dimension regarding residents' attitudes towards the development of a tourism policy. From the findings a total of 14 variables qualify in the item to total correlation

Within Nominated Constructs

Again within the nominated construct, **tourists**, the following correlations should be emphasised, within the framework of the same criterion (0.3 or -0.3 or above): .

Q.9: 'The tourists that come to Madeira are usually not very friendly'

Q.5: 'I like most tourists as long as they do not move here to stay' ($r = .3040$)

Q.9: 'The tourists that come to Madeira are usually not very friendly'

- Q8: 'This island would be a better place if there were no tourists here' ($r = .3807$)
- Q.10: 'The tourists do not pay their 'fair share' for the services provided them'
- Q5: 'I like most tourists as long as they do not move here to stay' ($r = .3038$)
- Q.10: 'The tourists do not pay their 'fair share' for the services provided them'
- Q.9: 'The tourists that come to Madeira are usually not very friendly' ($r = .3625$)
- Q.13: 'The tourists I have seen in our shopping malls and stores are generally rude and pushy'
- Q.8: 'This island would be a better place if there were no tourists here' ($r = .3109$)
- Q.13: 'The tourists I have seen in our shopping malls and stores are generally rude and pushy'
- Q.10: 'The tourists do not pay their 'fair share' for the services provided them' ($r = .3102$)

There is confirmation of good correlation for the construct tourists. Six pairs qualify.

Tourism Industry

The following correlation qualifies:

- Q.7: 'I believe that the tourism industry has improved the quality of life in the island'
- Q.4: 'On the whole, the tourism industry regulates and policies its activities well' ($r = .3427$)

Two variables qualify (one pair).

Economic impact

- Q.23: 'The advertising money spent by the Government and related bodies to attract tourists is a good investment'
- Q.3: 'The tourism industry provides many worthwhile employment opportunities for Madeira residents' ($r = .3525$)

Two variables qualify (one pair).

Future actions

Q.15: 'I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island'

Q.14: 'I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use' ($r = .4494$)

Q.18: 'I feel that Madeira is growing too fast'

Q.17: 'I am in favour of limiting economic growth in the island in which I live'
 $r = .4268$.

Four variables qualify (two pairs).

Between Constructs

Using the same criterion of selecting variables at level of 0.3 or -0.3 or above, the construct attitudes to **tourists** correlates with attitudes **future actions** related to tourism.

The score found was ($r = .4006$). The following variables are part of attitudes to **tourists** construct:

Q.1: 'As a whole, tourists who come to Madeira are inconsiderate of our island resources'

Q.5: 'I like most tourists as long as they do not move here to stay'

Q.8: 'This island would be a better place if there were no tourists here'

Q.9: 'The tourists that come to Madeira are usually not very friendly'

Q.10: 'The tourists do not pay their 'fair share' for the services provided them'

Q.13: 'The tourists I have seen in our shopping malls and stores are generally rude and pushy'

Q.21: 'There would be little traffic congestion if not for the tourists'

The following variables are part of attitudes to **Future actions** related to tourism construct:

Q.14: 'I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use'

Q.15: 'I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island'

Q.17: 'I am in favour of limiting economic growth in the island in which I live'

Q.18: 'I feel that Madeira is growing too fast'

Q.19: 'Madeira is too dependent on tourism'

From the findings, 12 variables qualify those of the nominated construct **tourists** and the nominated construct **future actions**.

The correlations were:

- item to total, 14 variables;
- within nominated constructs, 16 variables;
- between constructs, 12 variables.

As a consequence, from the findings, the correlations within constructs are greater than the other correlations. In effect the findings suggest that there are underlying dimensions regarding the attitudes of residents towards the impacts and consequences of tourism. On the other hand the correlations examined encouraged further search for the emergence of further underlying structure: the factor analysis model.

B. Bartlett Test of Sphericity

Value: 1611.468

Bartlett test of sphericity is a statistical test for the significance of all correlations in a correlation matrix. As a consequence it is a statistical tool for examining the presence of correlations among the variables. It shows the statistical probability that

the correlation matrix has significant correlations among, at least, some of variables (Hair, et. al., 1998). Values above .50 for the entire matrix or an individual variable are relevant. However, increasing the sample size, provokes the test to become more sensitive to detecting correlations among variables. In addition, Bartlett test is a way of determining the appropriateness of factor analysis in examining the correlation matrix. In effect, the large value and the small significance level, supports that the correlation matrix has significant correlations, for, at least, some variables.

C. Kaiser- Meyer- Olkin (KMO) Measure of Sampling Adequacy

Another measure to quantify the intercorrelations among variables and the appropriateness of factor analysis is the measure of sampling adequacy (MSA). This index ranges from 0 to 1, achieving 1, when each variable is absolutely predicted by the other variables. According with the literature (Hair, et al., 1998), the following guidelines are suggested: .80 or above, meritorious; .70 or above, middling; .60 or above, mediocre; .50 or above, miserable; and below .50, unacceptable. Kaiser- Meyer-Olkin measure of sampling adequacy has the adequate value of .74 for the general correlation matrix, thus qualifying for factor analysis.

7.7.3 Methodology for Factor Analysis

The survey, examined four areas of resident attitudes: tourists, industry, economic impact and future actions. The correlations have been calculated, and support factor analysis of the data. 'A factor is a construct, a hypothetical entity, a latent variable that is assumed to underlie tests, scales, items, and, indeed, measures of almost any kind' (Kerlinger,1986, p.569). According to the same author (1986), factor analysis, due to its 'power, elegance, and closeness to the core of scientific purpose' can be considered 'the queen of analytic methods'. Moreover, factor analysis, is a way of data summarisation and data reduction technique, converting the multiplicity of tests and measures in an underlying structure. As Coakes and Steed (1999, p.155) point out : 'Factor analysis is a data reduction technique used to reduce a large number of variables to a smaller set of underlying factors that summarise the essential information contained in the variables'. Thus this type of

analysis is appropriate for the purpose of the study which searches for structural explanation of residents' attitudes.

A. Justification of the Factor Extraction Method

Two basic models for obtaining factor solutions can be used: common factor analysis and principal component analysis. The latter was selected as an extraction method, taking into account, the objective of the research in summarising most of the information (variance), in a minimum number of factors, for prediction objectives (Hair, et. al., 1998, p.100). However, it should be noted, that component analysis has the possibility of containing 'hybrid' factors, mainly in the later factors to be extracted, because the unique variance overlaps with common variance (Child, 1970, p.44; Szivas, 1996, p.236). Nevertheless, principal component analysis was chosen, because the power of factor analysis as an exploratory tool for examining relationships among variables, in order to identify groups forming latent dimensions (factors).

B. Factor Rotation

Orthogonal (Varimax)

An important tool in examining factors is factor rotation, by reducing some ambiguities that sometimes come together with the preliminary analysis. A Varimax rotation was conducted in order to achieve results more easily interpretable. The main objective of any rotation is 'to obtain some theoretically meaningful factors and, if possible, the simplest factor structure' (Hair et. al., 1998, p.109). The varimax rotation method has been used 'for its ability to minimise the number of variables having a high loading on a factor and thus facilitating the interpretation of the resultant factors' (Szivas., 1996, p.236).

C. Missing Values

A pairwise exclusion of missing values was used. This method has been used in other studies (Szivas,1996) and is therefore appropriate.

D. Number of Factors to be Extracted

The starting point, regarding factor analysis, is the research problem. As a consequence, the number of factors could be selected a priori according with the research hypothesis. The number of factors considered in this study were four: tourists, industry, economic impact and future actions. However, this set of four factors, was assumed on an exploratory basis, opening the doors to further research. Moreover, Kaiser's criterion suggests that only factors with Eigenvalues greater than or equal to 1 be considered.

The number of factors with a minimum Eigenvalue of 1 is 8, suggesting that the factor extraction, should have its stopping line after the 8th factor. Table 7.16 shows the eight factor solution within the framework of the extraction method: principal component analysis

Factors:	Name:
Factor 1	Tourists
Factor 2	The Tourism Industry
Factor 3	ProTourism
Factor 4	Anti Tourist
Factor5	Fear of Growth
Factor 6	Tourism Amenities
Factor 7	Limited Tourism
Factor 8	Institutional tourism

Table 7.16 The Named Factors

According to the percentage of variance criterion, the number of factors to be extracted, is related to the cumulative percentage of variance which they account for. The eight factor solution accounts for 59.2% of the variance. Following Hair et al (1998), in social sciences a solution that accounts for 60% of the total variance, or even less, is considered satisfactory. As a consequence, the eight-factor solution seems to be justifiably supported. Table 7.17, indicates the major properties of the eight factors.

Factors:	Eigenvalue:	%of variance:	Cumulative %:
Factor 1	3.75015	16.3	16.3
Factor 2	2.66342	11.6	27.9
Factor 3	1.42866	6.2	34.1
Factor 4	1.36336	5.9	40.0
Factor 5	1.28844	5.6	45.6
Factor 6	1.09140	4.7	50.4
Factor 7	1.03959	4.5	54.9
Factor 8	1.00146	4.4	59.2

Table 7.17 The 8 Factor Solution

Figure 7.1 shows a diagram.

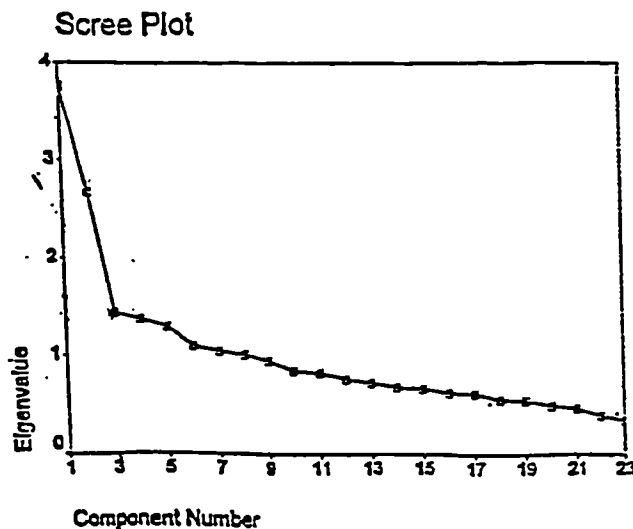


Figure 7.1 Scree plot

The graph is obtained by plotting the Eigenvalues against the number of factors in the order of their extraction. The critical feature in the plot is an 'Elbow', the cut-off point, the number of factors then being taken as the number of Eigenvalues until this point (Everitt and Wykes,1999). In Figure 7.1 the line can be interpreted as straightening at the 6th factor or at the 10th factor. There are three factors. These results show the need for 'multiple decision criteria' in selecting the number of

components to be taken into account. In this research the 8th factor model is justified by its support for adequate percentage of cumulative variance: 59.2%.

7.7.4 Findings from Factor Analysis

Following the above criteria, factor analysis, using the principal component method, presented a eight factor solution. The association of variables to factors, took into account, the factor loading, as the correlation between the original variables and the factors. As a consequence, the factor matrix is a matrix of loadings or correlations, between the variables and factors (Hair et. al., 1998). The allocation of variables to factors shows a structure of factor loadings, where some variables, have a significant loading on more than one factor. The factors and loadings are shown in Table 7.18.

The factor loadings range from .327 to .798. Using a criterion, for a sample size of 350, at 80% power and 5% significance level, the significance level for factor loadings is .30 (Hair et. al., 1998, pp. 111-112). In addition, the loadings are mainly positive with the exception for the following variables:

- **variable 19:** 'Madeira is too dependent on tourism' on factor 2 (tourism industry)
- **variable 2 :** 'If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities' on factor 6 (tourism amenities)
- **variable 20:** 'The airline connections in Madeira are good because of tourism' on factors 6 and 8 (tourism amenities and institutional tourism).

These variables may suggest that they are alternatives and not independent or working together.

	Fact1	Fact2	Fact3	Fact4	Fact5	Fact6	Fact7	Fact8
As a whole, tourists who come to Madeira are inconsiderate of our island resources							.69786	
If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities		.34356				.51004		
The tourism industry provides many worthwhile employment opportunities for Madeira residents		.65685						
On the whole, the tourism industry regulates and policies its activities well			.72223					
I like most tourists as long as they do not move here to stay	.49531						.55665	
I believe that tourism in Madeira has cause taxes to go up for Madeira residents because of extra police needs, roads and so on						.67771		
I believe that the tourism industry has improved the quality of life in the island		.46730	.54952					
This island would be a better place if there were no tourists here				.74617				
The tourists that come to Madeira are usually not very friendly	.32771			.66346				
The tourists do not pay their 'fair share' for the services provided them	.46907					.38557		
The tourism industry is good for Madeira's economy		.50775	.33607					
Overall the tourism industry does a good job in supporting the region in which I live			.78209					
The tourists I have seen in our shopping malls and stores are generally rude and pushy				.49823				
I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use	.71465							
I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island	.74823							
The tourism industry in our island is too commercialised					.42580			.54957
I am in favour of limiting economic growth in the island in which I live					.76037			
I feel that Madeira is growing too fast					.79855			
Madeira is too dependent on tourism		.71819						
The airline connections in Madeira are good because of tourism			.36214			.53138		-.50453
There would be little traffic congestion if not for the tourists	.36502							.46597
The tourism industry has too much political influence in the island								.68911
The advertising money spent by the Government and related bodies to attract tourists is a good investment		.47974					-.54916	

Table 7.18 Factor Loadings following Varimax Rotation - A Eight Factor Solution

On the other hand, the overall items suggest a possible conceptually and structurally distinct aspect of the attitudes towards tourists, industry, economic impact and future actions.

7.7.4.1 The Labelling of Factors

After obtaining a factor solution, the next step is an attempt to give some meaning to the pattern of factor loadings. Despite trying a holistic approach, variables with higher loadings were considered more important for selecting a name or label. The signs are interpreted as with any other correlation coefficients (Hair et. al., 1998). Moreover, the labels were considered on the criterion of 'its appropriateness for representing the underlying dimensions of a particular factor' (Hair et. al., 1998,p.114). In addition, the eight factors, despite showing some association with the proposed nominated structure of 4 areas, allow an expanded orientation for planning and action as well as strategic and tactics of both politics and policy. As stated before, in order to explore and simplify the underlying structure of the residents' attitudes towards the impacts and consequences of tourism, the twenty-three statements were summarised in eight factors using Principal Components Analysis as a tool. These eight factors explained 59.2% of the variance. The labelling of the factors is subjective and subject to interpretation. This subjectivity does not always capture the true essence of the underlying structure because it fails to suggest consensual names. On the other hand the complex nature of residents' attitudes to the impacts and consequences of tourism should be emphasised.

Factor one labelled Tourists comprised mainly the attitudes of residents to tourists with relevance for the tax issue. The second factor, called as Tourism Industry included, as a construct, the attitudes of residents towards the tourism industry with relevance for the dominant position of tourism as a sector and its importance as employment generator. Factor three named Pro Tourism included a range of statements showing mainly benefits accruing from the tourism industry. Factor four, labelled Anti Tourist dealt with anti tourist lobby. Factor five, labelled Fear of Growth contained statements revealing a cautionary dimension in relation to growth. Factor six called Amenities such as services, facilities, equipment's and infrastructures included items dealing with the potential of tourism for

development providing amenities on the island. Factor seven named Limited Tourism dealt with statements taking into account resources and the pair budget / demand evolving a concept of tourism development. Finally, factor eight, named Institutional Tourism grouped hybrid statements ranging from trade, transport, traffic congestion and political issues as being part of tourism as an overall institutional sector.

The solution of five factors: Tourists, Tourism Industry, Pro Tourism, Anti Tourist and Fear of Growth accounted for 45.6% of the variance but would be more mutually exclusive. The criterion used for selecting the factors of this study captured the structural dimensions on attitudes of residents towards the impacts and consequences of tourism within a frame that was neither reductionist nor simplistic.

The factors and the variables are listed below:

Factor 1: Tourists

- 4.5. I like most tourists as long as they do not move here to stay.
- 4.9. The tourists that come to Madeira are usually not very friendly.
- 4.10. The tourists do not pay their 'fair share' for the services provided them.
- 4.14. I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use.
- 4.15. I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island.
- 4.21. There would be little traffic congestion if not the tourists.

Factor 2: The Tourism Industry

- 4.2. If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities.
- 4.3. The tourism industry provides many worthwhile employment opportunities for Madeira residents.
- 4.7. I believe that the tourism industry has improved the quality of life in the sland.
- 4.11. The tourism industry is good for Madeira's economy.

- 4.19. Madeira is too dependent on tourism.
- 4.23. The advertising money spent by the Government and related bodies to attract tourists is a good investment.

Factor 3: ProTourism

- 4.4. On the whole, the tourism industry regulates and policies its activities well.
- 4.7. I believe that the tourism industry has improved the quality of life in the island.
- 4.11. The tourism industry is good for Madeira's economy.
- 4.12. Overall the tourism industry does a good job in supporting the region in which I live.
- 4.20. The airline connections in Madeira are good because of tourism.
- 4.21. There would be little traffic congestion if not for the tourists.

Factor 4: Antitourist

- 4.8. This island would be a better place if there were no tourists here.
- 4.9. The tourists that come to Madeira are usually not very friendly.
- 4.13. The tourists I have seen in our shopping malls and stores are generally rude and pushy.

Factor 5: Fear of Growth

- 4.16. The tourism industry in our island is too comercialized.
- 4.17. I am in favour of limiting economic growth in the island in which I live.
- 4.18. I feel that Madeira is growing too much.

Factor 6: Tourism Amenities

- 4.2. If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities.
- 4.6. I believe that tourism, in Madeira has caused taxes to go up for Madeira residents because of extra police needs, roads and so on.
- 4.10. The tourists do not pay their 'fair share' for the services provided them.
- 4.20. The airline connections in Madeira are good because of tourism.

Factor 7: Limited Tourism

- 4.1. As a whole, tourists who come to Madeira are inconsiderate of our island resources.
- 4.5. I like most tourists as long as they do not move here to stay.
- 4.23. The advertising money spent by the Government and related bodies to attract tourists is a good investment.

Factor 8: Institutional tourism

- 4.16. The tourism industry in our island is too comercialized.
- 4.20. The airline connections in Madeira are good because of tourism.
- 4.21. There would be little traffic congestion if not for the tourists.
- 4.22. The tourism industry has too much political influence in the island.

The factor analysis has justified the proposed model of attitude orientation of residents' approach towards the impact and consequences of tourism and attitudes towards the development of tourism. The resultant eight dimensions are as follows:

- 1. Tourists
- 2. The Tourism Industry
- 3. ProTourism
- 4. Antitourist
- 5. Fear of Growth
- 6. Tourism Amenities
- 7. Limited Tourism
- 8. Institutional Tourism

Thus eight dimensions are considered and the hypothesised four dimensions of attitudes towards tourists, tourism industry, economic impact and future actions are expanded.

In seeking an answer for research question 2, asking '**do residents of Madeira have the same patterns of attitudes regarding the social impacts and consequences of tourism?**' it emerges from the results, that it is not possible to reject the null hypothesis because the residents of Madeira have different patterns

of attitudes towards tourism in general. In effect the negative and positive attitudes to the items, their standard deviations, t-tests and ANOVA, suggest that statistically, there are different patterns of attitudes between and among residents.

The first research question concerned whether or not there were any underlying dimensions regarding residents' attitudes towards tourism. **The research question asked 'are there any underlying dimensions regarding residents' attitudes towards the impact and consequences of tourism?'** The null hypothesis should be rejected because factor analysis showed that the eight factors constitute an underlying dimension regarding the residents' attitudes towards the social impacts and consequences of tourism

Some literature suggested (Madrigal 1993; Perdue et. al.,1990; Snaith and Haley 1994; Snaith 1999) that a two factor structure emerged which indicated positive and negative dimensions. Snaith (1999) confirms these observations, with two-factor structures apparent in three samples in York, Bath and Chester. Other studies (Ap and Crompton, 1998; Snaith et. al., in progress) argue for the discovery of another four potential dimensions: crowding and congestion, services, taxes and community attitude. This study hypothesised four underlying dimensions and the results from factor analysis expands these dimensions to eight factors. The dimensions found in this study were: tourists, tourism industry, pro tourism, anti tourism, fear of growth, tourism amenities, limited tourism, institutional tourism. However factor analysis shows that there is a structure but it does not show how the structure is applied by residents. This should be for further studies.

7.8 Overview of the Research

This research is an examination of and reflection on the attitudes of residents of Madeira towards the impacts and consequences of tourism as well as their views on tourism policy. The research question that guided this study was: **'what is the relationship of attitudes of residents towards the impact of tourism and the attitudes of residents towards the development of tourism?'** Specifically this research sought to:

1. Examine the attitudes of residents of Madeira;
2. Identify the factors that determine the attitudes and
3. Explore the role of residents' attitudes to the implementation of tourism policy by the Government.

Hypothesised constructs were analysed in order to find underlying dimensions on attitudes to tourism in general relating to their positive and negative attitudes. Research questions and hypotheses were developed keeping in mind the objectives of the study. **Research question one was 'are there any underlying dimensions regarding residents' attitudes towards the impact and consequences of tourism?'** To answer this question the positive and negative attitudes were examined and studied in relationship to four dimensions of tourism. These four dimensions were not mutually exclusive but offered a place to start understanding patterns and structures of residents' attitudes. An examination of the mean scores and standard deviations indicates that residents have favourable attitudes towards tourism. Results showed that 364 respondents have positive attitudes and only 19 respondents have negative attitudes regarding tourism. Moreover the grand mean is 3.65. However respondents' attitudes showed appreciable discrepancies on the statements. For example the statement 'the tourism industry is good for Madeira's economy' had a mean of 4.46 while the statement 'Madeira is too dependent on tourism' scored 2.04. Overall examination of the mean score for the four constructs indicates that respondents have favourable attitudes towards tourists (mean of 4.02); tourism industry (mean of 3.30); economic impact (mean of 4.10) and future actions (mean of 3.26).

The standard deviations, as far as the twenty-three statements are concerned were high, ranging from 1.13 for tourism industry; 1.49 for future actions to 1.07 for tourists and 0.97 for economic impact. These high standard deviations showed heterogeneity of respondents' attitudes in relation to the twenty three statements. Substantially respondents' support tourism. There was an underlying dimension of residents' attitudes; factor analysis confirmed with eight factors an expanded version of the four constructs. As a consequence the null hypothesis should be rejected because there are underlying dimensions regarding residents' attitudes

towards the impacts and consequences of tourism and these dimensions are related with their positive and negative attitudes.

Research question two asked ‘do the residents of Madeira have the same patterns of attitudes regarding the social impacts and consequences of tourism?’ The descriptive statistics on residents’ attitudes in chapter 7, namely their different means, standard deviations and percentages on the measurement of attitudes, t-tests and ANOVA, provide empirical evidence of different attitude patterns. The overwhelming number of residents support tourism, with overall positive attitudes. However the grand mean of 3.65 for the attitude scales has shown that the positive attitudes are fairly mild. The standard deviations of 1.12 for all the twenty-three statements, indicated an heterogeneity in responses that ranged from strongly positive attitudes to attitudes fairly neutral. As a conclusion, data analysis support evidence for not rejecting the null hypothesis that stated that ‘the residents of Madeira have different attitude patterns regarding the social impact and consequences of tourism’.

Research question three asked: ‘is it possible to predict residents’ attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism?’ In order to establish the respondents’ level of knowledge about tourism and its role in Madeira, residents were asked three questions about tourism’s economic importance to the island. Those who answered the questions correctly were considered to have more accurate knowledge and those who did not answer correctly, had inaccurate knowledge.

The answers were transformed into dichotomous variables for data analysis. The questions were about tax revenue, revenue production and employment. The residents revealed an unreliable perception of the importance of tourism to the island, with a low level of accuracy in their awareness about tourism importance. As far as tax revenue is concerned, the majority of respondents do not have reliable perception, and those with more reliable perception are not more in favour of tourism. Further analysis was made to determine if there were differences between those considering and those not considering tourism as a major revenue producer for the island. Those who believed tourism contributes as a major revenue producer

have a grand mean of 3.66, those against have a grand mean of 3.57. T-tests on the mean were conducted to assess if there were significant differences. The results of the T-tests indicate no significant differences except for one variable (Q.7).

Respondents were also asked to state whether tourism was the biggest revenue earner in the island. Again the overwhelming majority believed that it is. However T-tests on the mean were conducted to investigate if there were significant differences in the mean and no significant differences were found except for six variables (Q.2; Q.5; Q.9; Q.15; Q.17; Q.19.).

When asked what percentage of Madeira's employment was generated by tourism, only 44 respondents showed a reliable perception of tourism as an employment generator against the 338 respondents with an unreliable understanding. Again those with inaccurate knowledge revealed a more positive attitude towards tourism and again no overall statistical significance was found with exception of an individual variable (Q.7). This conclusion is against the findings of Davis et. al., (1988) that argue that the Florida experience shows a strong positive relationship between knowledge of tourism's impact on the economy and appreciation of the tourism industry. In effect the same authors (1988) contend that the degree of negativity shown by residents is related inversely to the tourism knowledge. The more clearly, the residents know about tourism, the less negative they are towards tourism. Clearly there is a link between the perceived economic importance of tourism to the island whether they have or do not have accurate knowledge and attitudes towards tourism. However in relation to the research question it is not possible to reject the null hypothesis and as a consequence it is not possible to determine residents' attitudes towards tourism impacts and its consequences according to their knowledge about the importance of tourism. The null hypothesis is accepted.

Research question four asked: 'is it possible to predict residents' attitudes towards the impacts and consequences of tourism according to their socio-economic and demographic characteristics?' The demographic variables considered were:

A. Gender

The gender of residents was hypothesised for exploring differences in attitudes towards tourism in general. A mean on the attitude scale of 3.60 indicates that women in Madeira appear to have a slightly less positive attitude towards tourism than men who got a mean of 3.67. However a T-test revealed no significant differences between the two sub-samples despite some significance for two variables (Q.17 and Q.23). Gender does not determine attitudes.

B Business Related to Tourism

Business related to tourism was examined because it was thought that those with a business in tourism would have more positive attitudes than those without business related with tourism. Those with businesses in tourism have slightly more positive attitudes 3.67, against 3.64. A T-test on the means indicates no significant differences between the two groups except for five variables(Q.5; Q.7; Q.12; Q.19; Q.23.). From the findings there is room for the conclusion that those with a tourism business and those without, despite some differences, have a general similarity. As a consequence owning a business does not determine attitudes to tourism.

C. Education in Tourism

Education in tourism was selected because it was thought that those educated in tourism would be more supportive of tourism. Despite differences in the mean score of those educated in tourism with 3.71 and those not educated with the mean of 3.64, T-tests reveal no significant differences except for two variables (Q.8 and Q.11). As a conclusion education in tourism is not determinant of residents' attitudes to tourism.

D. Working in Tourism

Those working in tourism (money related), had a mean score of 3.74. Respondents not working in tourism had a mean of 3.63. T-tests revealed no significant differences between these groups. These results were a surprise and suggested that employment in tourism is not determinant of attitudes to tourism.

E. Contact with Tourists

Respondents with contact with tourists, scored 3.72 and those without contact, scored 3.61. T-tests reveal no significant differences except for two variables (Q.2 and Q.8). The conclusion is that contact with tourists in the job is not a determinant in attitudes to tourism

F. Family Related

In relation to family related to tourism those with, scored 3.62 against those without scoring 3.67. T-tests reveal significant differences only for two variables (Q.12 and Q.19). Again family relations with tourism is not a determinant of attitudes to tourism. As general conclusion these demographic variables are not determinants of attitudes towards tourism.

G. Age

Also age of respondents was considered to assess to what extent it was determinant of attitudes. Despite two groups of young people, those between 15 and 24 years old and the group of 35-44 scored higher than the other groups having scored 3.71. Analysis of variance (ANOVA), reveals no significant differences among groups mean except for two variables (Q.19 and Q.21).

H. Educational Level

The educational qualification was chosen because it was considered to have a strong influence on attitudes towards tourism. Results indicate that those with secondary education (high school) and those with higher education, with means of 3.67 and 3.66 have more positive attitudes towards tourism than the other groups. As a consequence those with high levels of education have more positive attitudes, than those with low levels of education. Again analysis of variance (ANOVA), shows no significant differences among groups. Only three variables of the data set have significant differences (Q.6; Q.20 and Q.21).

I. Occupational Level

The occupational variable was selected for relating employment status with attitudes to tourism. The findings show that those working both on a full-time basis or part-timers with means of 3.70 and 3.73, jointly with students with the

mean of 3.69, have more positive attitudes toward tourism than other groups. Again analysis of variance (ANOVA) indicates no significant differences within groups except for eight variables (Q.1; Q.5; Q.9; Q.11; Q.17; Q.18; Q.20; Q.21.). As a conclusion some groups have different attitudes patterns and there are trends but as a whole from these three latter variables and the other demographic ones, the null hypothesis cannot be rejected and the socio-demographic variables are not determinants of attitudes to tourism in general. From the literature review this is a very controversial issue with a huge lack of consensus.

In order to explore the views of residents' towards the development of tourism policy and their pressure on the Government it was considered to what extent resident support tourism development. Three variables were selected:

4. support of tourism development;
5. encouragement of tourism growth;
6. attitudes to further tourism expansion.

Research question five asked 'is it possible to determine residents' support of tourism policy according to their attitudes towards tourism impacts and its consequences?' The data show, overwhelmingly residents support for the development of tourism, for encouragement of tourism growth and views about planning tourism expansion for attracting more demand. When related to overall attitudes towards tourism in general, not surprisingly, those in favour of further tourism development had more positive attitudes towards tourism. However, once again for some individual variables there were significant differences. They were:

For development support (Q.3; Q.7; Q.8; Q.11; Q.13; Q.19; Q.23.)

For encouragement of tourism growth (Q.2; Q.7; Q.18; Q.23.).

For planned expansion to attract more tourists (Q.2; Q.3; Q.11; Q.15; Q.21; Q.23.).

From the findings the conclusion is that the null hypothesis cannot be rejected because it is not possible to determine the residents' support for the development of

tourism according to their attitudes. However some indicative trends should be taken into account with the associations and links of these independent and dependent variables.

Factor Analysis

In order to explore underlying dimensions of respondents' attitudes, after adequate correlations, factor analysis was made showing the number of factors, the percentage of variance and the factor loadings.

The number of factors considered in this study were four: tourists, industry, economic impact and future actions. This set of factors, was assumed on an exploratory basis, opening the doors for further research. From the data the number of factors with a minimum Eigen value of 1 was 8, and the factor extraction had its stopping line after the 8th factor. The named factors were:

tourists;
the tourism industry;
pro tourism;
anti tourist;
fear of growth;
tourism amenities;
limited tourism;
institutional tourism.

The overall factors suggest a possible conceptually distinct aspect of the attitudes towards tourists, industry, economic impact and future actions, but it may be concluded that the underlying dimensions of eight factors expand and complement the hypothesised construct matrix of four areas or nominated constructs.

The trends support what was expected, that residents of Madeira are united in one important platform: an almost universally shared consensus of what is the importance of tourism for the island.

The research is part of the theoretical and empirical debate about the resident's attitudes towards tourism and its importance for tourism policy. From the extensive literature review on the subject, the most relevant for this study were (Davis et al.1988; Ryan and Montgomery 1994; Lindberg and Jonhson 1997; Ryan and al.1998). On the other hand this dissertation offers a literature review theoretical critique embracing new perspectives on the topic that being speculative, move on within the boundaries of the subject with 'a reasonable conjecture'.

A sample of 498 individuals was selected to test the pilot questionnaire in 1996. This sample for a pilot study is considered large. The main survey was based on 397 questionnaires on a random basis. The sample size of this study is bigger than other similar studies. This was the first main study of residents' attitudes in a non-English speaking country using Davis et al (1998) questionnaires. From the findings, the residents' attitudes of Madeira, as a mature destination, are very favourable to tourism development in terms of life cycle theory. This study, in line with Ryan et. al., (1998), also found that socio-demographic variables were not determinants of attitudes towards tourism and in addition, in line with Lindsberg and Johnson (1997), emphasises the importance of value systems for explaining attitudes. However, this research emphasising the relationships between attitudes and values, argues that the approach of ideologies as clusters of values is applicable to Madeira, as a mature destination. Furthermore, this research looks at the importance of residents as stakeholders within the framework of a communitarian tourism perspective. In addition this research hypothesised some theories for better explaining or helping attitudes interpretation. With this in mind, altruism surplus theory, Anastasi and Urbina highlights, the gift relationship theory and Peter Singer theory might suggest a more altruistic and speculative support for residents' attitudes. In effect due to the lack of strong explanatory power of variables like knowledge, sociodemographic and behavioural ones an epistemological field can be open with the contribution of other approaches, such as political and ideological ones.

The attitude of residents and their views are of paramount importance for tourism policy. Most of the studies in tourism development argue for a technical approach regarding tourism. The technical approach includes concepts of planning and

management, instead of policy or politics. Consideration of residents as stakeholders in tourism should be considered in further studies. In effect according to Johnson and Scholes (1993, p.157): 'Stakeholders are groups or individuals who have a stake in, or an expectation of the organisation's performance, and include employees, managers, shareholders, suppliers, customers and the community at large'.

Residents represent the community. This research approach is the resident's point of view. It is a reminder (but also a limitation) that the way in which residents analyse and respond to tourism is strongly tied up with the island regional culture, which is a key frame of reference for attitudes towards tourism. A culture of feedback from residents' attitudes, can be useful for strategic management, planning and policy, for decision makers. To quote Johnson and Scholes (1993, p.172): 'understanding stakeholders and how they are likely to influence the organisation's strategy is a very important part of any strategic analysis and forms the core of an assessment of the cultural / political dimensions of a strategy'.

What emerges from this research is the need to understand the attitudes of different residents, and to weigh these in terms of the power that they exercise or do not exercise. In so doing, a conclusion may be stated that it is required to speculate on the degree of unity or diversity between various groups of residents for dealing with present and future events. Mapping residents' attitudes for example can be a way of assessing their attitudes to understand who are the supporters or blockers of a strategy and policy. In effect successful strategies and policies are those which look for compromise between the conflicting interests of the various residents and their attitudes. From this research it can be concluded that according to Johnson and Scholes (1993), that Government (central, local or regional) is an example of how a variety of stakeholder groups, with different expectations, attitudes and values attempt to influence the formulation of a strategy. And in addition, to quote Johnson and Scholes (1993, p.173): 'the electorate is able to influence the situation by allocating power to political parties. They in turn are subject to their own internal pressures from groupings with differing expectations and must reconcile their policies with the views of opposition and the administrators in the government departments'.

To summarise, this study proposed several hypotheses. The data were analysed using a variety of techniques such as descriptive statistics, T-Tests, ANOVA, and factor analysis to confirm or reject the hypotheses. This study suggests eight dimensions of residents' attitudes towards social impacts and consequences of tourism.

CHAPTER 8

CONCLUSIONS AND RECOMMENDATIONS

8.1 Introduction

The main objective of this research was to assess the attitudes of residents of Madeira toward tourism to the island and to explore the views about consequent tourism policy. The main research question was designed to assess the relationship between residents' attitudes towards the social impacts and consequences of tourism and the development of tourism. The outcomes were:

- There are underlying dimensions regarding residents' attitudes towards the impacts and consequences of tourism;
- Residents of Madeira have different patterns of attitudes regarding the social impacts and consequences of tourism;
- It is not possible to determine residents' attitudes towards tourism impacts and its consequences according to their knowledge about tourism;
- It is not possible to determine residents' attitudes towards tourism impacts and its consequences according to their socio-economic and demographic characteristics;
- It is not possible to determine residents' support for the development of tourism policy according to their attitudes towards tourism impacts and its consequences.

8.2 Summary of Findings

From the findings, 364 respondents displayed a positive attitude towards tourism with only 19 showing a negative attitude and 4 a neutral attitude. It can be concluded that respondents substantially support tourism. However, a grand mean of 3.65 for the battery of items shows that overall the positive attitudes are fairly mild. Within this a standard deviation of 1.12 indicates a heterogeneity in responses that is likely to range from strongly positive attitudes to attitudes which are fairly neutral.

The results of the questionnaire show the strongest positive perceived impacts. However the negative perceived impacts have not resulted in hostile behaviour towards tourism. In effect, in order to explore the views of residents towards the development of tourism policy and their views on Government, three questions tested the residents' support for the development of a tourism policy. When asked if legislators should support tourism development, overwhelmingly, respondents said yes; 351, against 30, who said no. When questioned if the encouragement of further tourism growth by the government was a good idea, those saying yes were 306, versus those saying no, 75. Those saying no can be considered the lobby against tourism or at least fearing tourism growth. In addition, when asked if the planned expansion to attract more tourists was a good idea, 353 of respondents said yes and 27 said no. On the other hand, those in favour of Government support for development had more positive attitudes towards tourism, scoring on the 23 items on attitudes 3.68; 3.69 and 3.67. However, even those saying no to further tourism development had positive scores on the attitude items with means of 3.34; 3.49 and 3.37. These results reveal a consensus in the support of tourism development policy.

The questionnaire contains tourism development issues that are political and have an environmental and socio-cultural dimension but they are routed to economic impacts as well. The results show that residents of Madeira are aware of the importance of the economic, natural and socio-cultural resources as assets for tourism development. Moreover, the questionnaire focusing on impacts, attitudes, planning and policy for Madeira proves that it takes into account both the strengths and vulnerabilities of the Madeira system. The results also suggest a need for strategies and policies especially useful for Madeira as a mature destination. In so far, the results also suggest that the main challenge for Madeira is how to implement a policy, which is not anti-growth, but which accepts that there must be limits to growth. At the present the item "the tourism industry in our island is too commercialised" had a mean of 2.9, meaning agreement. The item "I am in favour of limiting economic growth in the island in which I live" and the item "I feel that Madeira is growing too fast" had the scores respectively of 3.4 and 3.3 revealing low levels of disagreement. It can be concluded that residents seem to associate these latter two items with jobs and business opportunities and explicitly do not

agree with the items. However a compromise between business and sustainable growth can be latent in the attitudes of residents. Also this study is in line with Davis et al., (1988) about some significant conclusions regarding tourism policy such as the need to educate residents on the positive impacts of tourism in general. In this regard the issues for educational purposes should include the tourist-generated revenue in the island, the effect of these revenues on tax structure, the employment opportunities created by tourism and the overall positive impacts of tourism in their community. Among them: quality of life, attractions and cultural events that residents can enjoy as well. The tourism policy- related messages should take into account the positive, negative and neutral attitudes of residents towards tourism.

8.3 Issues and Implications

Assessing underlying dimensions through factor analysis it is often subjective as regards the number of factors and their labelling. This research found 8 factors accounting together for 59.2% of the variance. A solution of 5 factors: tourists, tourism industry, pro tourism, anti tourist and fear of growth would account for 45.6% of the variance and would be more mutually exclusive. However it can be concluded that the attitudes of residents of Madeira are holistic, and thus electing a multifactorial approach which is neither simplist nor reductionist, and which seems fitting with the complexity of the tourism impacts and attitudes of residents towards the impacts. Some literature suggests (Madrigal 1993; Perdue et al., 1990; Snaith and Haley 1994; Snaith 1999) a two factor structure which indicates positive and negative dimensions. Other studies (Ap and Crompton 1998; Snaith et al., in progress) argue 4 potential dimensions and more recently Fredline and Faulkner (2000) suggest 6 factors.

There is increasing empirical support that residents have different patterns of attitudes, opinions and perceptions about the impacts and consequences of tourism (Mathieson and Wall 1982; Murphy 1981; Pizam 1978; Fredline and Faulkner 2000; Mason and Cheyne 2000). This study supports the findings of Hall (1994) and Joppe (1996) and others (Ap and Crompton 1993; Brougham and Butler 1981; Haramlambopolos and Pizam 1996; Husbands 1989; Lawson et al., 1998; Ryan and Montgomery 1994; Mason and Cheyne 2000) that communities are

constituted of groups and individuals with mixed reactions in relation to the impacts of tourism.

This research provided empirical evidence of different patterns of attitudes via descriptive and inferential statistics. However, as mentioned, the overwhelming number of residents in Madeira support tourism, with overall positive attitudes, although the grand mean of 3.65 for the battery of items of the attitude scales has shown that the positive attitudes were not extremely high. The standard deviations indicated an heterogeneity in the responses. From the literature, the main findings and conclusions of selected studies indicated differences in the attitudes, perceptions and opinions of residents according to variables such as: level of tourism development, economic dependence on tourism; distance from place of residence to tourist areas; level of contact with tourists; respondents demographics; community attachment; use of outdoor recreation facilities; general economic conditions of the community; perceived ability to influence tourism decisions; knowledge of tourism political self identification and influence of a tourism public relations campaign (Pearce et al., 1996).

This study concludes that it is not possible to determine residents' attitudes towards tourism impacts and its consequences according to their knowledge about tourism contrary to Davis et al., (1988); Keog (1990); Lankford and Howard (1994) that greater knowledge was associated to positive perceptions of tourism, more positive perceptions of the impacts of tourism and more support for tourism.

This study also concludes that it is not possible to determine residents' attitudes towards tourism impacts and its consequences according to the socio-economic and demographic characteristics. This is in line with Davis et al., (1988); Ryan and Montgomery (1994); Lindberg and Johnson (1997); Ryan et al., (1998) that socio-demographic variables were not found determining variables; to Keogh (1990) that there were no significant differences in attitudes of business owners and non owners and contrary to Pizam (1978) that entrepreneurs were more positive about tourism than other groups. Also this study is contrary to Rothman (1978), that economic dependency on tourism was related to more positive perceptions of tourism; Husbands (1989) that residents employed in tourism were more positive

about tourism; Perdue et al(1990) that personal benefits from tourism were important in explaining perceptions of positive but not of negative impacts of tourism; Madrigal (1993) that personal benefits from tourism were the best predictors of perceptions of tourism impacts and Lankford and Howard (1997) that those who were more dependent on tourism were more positive about tourism. This study is also contrary to Pizam (1978) that residents with more contact with tourists were negative about tourism. Therefore appears familiarity and involvement in tourism does not automatically ensure a positive attitude.

In addition this study concludes that it is not possible to predict residents' support for the development of tourism policy according to their attitudes towards tourism impacts and its consequences. In this area of policy and tourism little research has been carried out in other studies. This study is in line with the work of Lindberg and Johnson (1997). They emphasise that socio-economic variables do not directly determine the attitudes towards tourism. Also along with Ryan et al., (1998) that attitudes to economic realities are filtered through value systems, confirming those studies that have not been able to show clear relationships between socio-demographic variables and support or opposition to tourism development. However this study does not confirm the study of Pearce et al., (1998) that residents of more mature destinations are more likely to express reservations about tourism and its development, more in line with Doxey (1975). In effect there is strong support of Madeira residents for tourism development, despite the mature stage of tourism in the island or at least in a stage between development and consolidation. As a consequence, of this issue this study is more in line with Ap and Crompton (1993) and Faulkner and Tideswell(1997). This study is in line with the models of Doxey(1975) and Butler (1980) advocating a change of residents' attitudes to and involvement in tourism over time (Mason and Cheyne, 2000) but contrary also with Getz (1994) that more negative attitudes emerge from residents by the latter stages of his study in 1992 when compared to 1978 findings, both in Spey Valley in the United Kingdom.

This research is also in line with the conclusions of Faulkner and Tideswell (1997) that the most notable conclusion of resident's attitudes towards tourism is the generally positive attitudes of tourism's importance in the region. It is therefore

concluded that the altruistic surplus theory may apply to tourism residents' attitudes in Madeira. The altruistic surplus suggests that residents tolerate any downside impacts of tourism they might experience because they recognise the community-wide benefits of tourism even though many not have a direct relationship with tourism. In addition as mentioned, before the Madeira study along with the Gold Coast study of Faulkner and Tidswell (1997) also suggest that contrary to the Doxey model, residents in mature destinations do not become more antagonistic towards the social impacts and consequences of tourism development and its impacts.

Furthermore this study, along with Davis et al. (1988), Madrigal (1994) and Fredline and Faulkner (2000) on the one hand, used an ethic approach in the sense that a pre-determined battery of items was imposed upon residents. On the other hand, to some extent there is also an emic framework in the way that it was focused upon a community and policy approach. In addition this study is in line with Fredline and Faulkner (2000) in the conclusion that an investigation of variables such as socio-political values will be useful for the exploration of attitudes of residents towards the impacts and consequences of tourism. However as said before, the geographic fact of Madeira being an island, open and exposed to the world, and also the fact of living together for centuries, has forged its own personal and social ethos, mixed with a spirit of initiative, altruism and solidarity. Madeira it is said is defined by community rather than individualism and strict hierarchy. As a consequence this study goes further and suggests an original contribution for both a theory on attitudes and social political values in the explanation of attitudes to tourism, the potential of gift relationship theory and New Darwinian co-operation theory for a more communitarian and vibrant community and its residents. And this is not only valuable within the case study approach but to other types of research in general, beyond the case study perspective.

This study is along with Butler (1999) that to assess the real impacts of tourism and the level of sustainability, requires in-depth longitudinal research and environmental, economic and social auditing, and if the public sector is not willing to educate residents and other stakeholders will have little effect. Moreover, this study is along with Ritchie (2000) that to be competitive, a destination's

development for tourism should be sustainable economically, ecologically, socially, culturally and politically as well and that true competitiveness must be sustainable.

From both the findings and personal observations it can be concluded that Madeira residents' are aware of the delicate balance between systems and resources and it is suggested as a conclusion the following remedial actions:

- Use of economic, environmental, socio-cultural impacts assessment in consultation with residents;
- Standards and planning, monitoring and policy taking residents into account;
- Deconcentration (the need to reduce tourism concentration in Funchal).

This study can contribute as an exploratory and foundation research for the implementation of the two first guidelines mentioned above. In effect the more the attitudes of residents are taken into account the greater the level of consensus and the wider the spill-over benefits and the better for the mix of sustainable development of tourism and conventional mass tourism.

Funchal being a high-density city provides conditions to make tourism work more effectively as urban tourism. Moreover, the capital of Madeira is responsible in large part for a sense of regional cohesion and community that contributes what De Tocquville called the "habit of association". However, despite Funchal being considered a "Garden City", it is important to spread the benefits of tourism throughout the island.

Stakeholders in tourism should be more aware of the benefits and costs of tourism, of its possible positive and negative impacts – economic, environmental, socio-cultural and political. The challenge of this study was analysing the residents' attitudes for better defining and implementing management, planning, strategies and policies in the field of tourism. This research shows that it is possible to use the same questionnaire on a cross-national basis, contributing for present and future comparative research. Furthermore, the questionnaire and its results suggest

ways by which Madeira and other destinations can manage the tourism policy in order to maximise its positive aspects while minimising its negative effects.

Using this thesis as a foundation it addresses for further research and aims to be useful for other stakeholders in the field of tourism: academics, government officials, tourism industry executives, residents and tourists.

8.4 Recommendations

Based on the findings of this study the following recommendations are made:

- replicate the study in areas at different stages of development to test the generalizability of the findings;
- expand the study to examine other stakeholders in tourism, such as tourists, the private sector and the public sector;
- consider the influence of cultural values and political ideologies on residents' attitudes towards tourism;
- develop explanatory models that predict residents' attitudes towards tourism.

8.5 Contribution of the Research and Limitations

This research examined issues for which empirical evidence is both limited and ambiguous in other studies.

The findings of this research expand the body of tourism knowledge both by describing tourism attitudes on an island and mature destination. Moreover, advocating the relationship of attitudes, values and ideologies and seeing ideologies as clusters of values, this study invites the incorporation of values in the development of a tourism policy. In addition, this study is the first step towards an understanding of stakeholder tourism. Furthermore this research is multi-disciplinary as it incorporates theories from a number of fields such as sociology, psychology, policy, politics, philosophy, statistics, computing and tourism. In so doing this research contributes to the status of tourism as a science, with potential to fit the 'brainware' and knowledge based society.

Furthermore, the research has shown how factual, quantitative and theoretical-speculative data can be mixed together in a complementary way. Furthermore the samples of both the pilot questionnaire and main survey, gave to the research a platform for an appreciable number of residents being touched by the research. In so doing it was for Madeira a pioneering step. Also this research was a pioneer in the use of the questionnaire in a non-English speaking area, where the study was accepted as a relevant event for the residents and authorities alike.

The limitations of this study should be mentioned in order to provide guidance for other researchers.

The main limitation of the study is not building a model to **predict residents' support for the development of tourism policy according to their knowledge about tourism, their attitudes towards tourism and their socio-economic and demographic characteristics**. Further studies are required and should use statistical methods such as multiple regression and structural equation models. Another limitation of this research is that it did not examine the attitudes towards tourism of other stakeholders such as tourists, private sector, public sector and opinion leaders. Moreover part of statistical data and their relationship were collected from the last census of 1991. A new census is due in 2001 and the economy and society of Madeira have begun a huge process of change and development at an unprecedented speed and intensity in the last few years.

A previous study by Davis et. al., (1988) considered opinion of residents regarding the contribution of tourism to economic development and was included in his attempt to profile tourism residents' attitudes. This study used knowledge of the economic importance of tourism by dichotomising Davis categories into two groups; those with accurate knowledge and inaccurate knowledge of economic importance of tourism was made. Unfortunately, the current figure for Madeira was not well embedded in one of classification and thus at the cusp of the classification. This may have created problems in respondents' choice between two groups 11% - 25% and 26% - 50%. The analysis showed that very few respondents underestimated, more overestimated and many 'do not know' the contribution of tourism to economic development (see Appendix 6). In future research,

respondents should be asked open-ended questions enabling a more accurate grouping regarding inaccurate and accurate knowledge of the economic importance of tourism. Another limitation is that dichotomising residents into two groups, inaccurate and accurate knowledge, loses some of the richness of the data regarding those who underestimate and overestimated the economic importance of tourism

8.6 Need for Further Studies

Due to the ambiguities of the conclusion about attitudes of residents towards tourism further studies are suggested to investigate the issues at stake. It is particularly important that other variables are studied and a model is developed to enhance theory development. Cross-cultural comparison of residents' attitudes towards tourism would contribute towards the globalisation of tourism theory. Until now tourism has borrowed theories and methodologies from other sciences. It should continue to do so, but it should also generate tourism theories.

In terms of methodology, the research provides further evidence of the usefulness of quantitative approach. However the application of other quantitative research methods, as well as focus groups in the study of resident's attitudes and values is a line of research which is worth pursuing.

APPENDIX 1

Pilot Study Big Picture

- 1) An attitude survey was carried out in Funchal, based on a Likert scale. The main objective of the study is the relationship between attitudes of residents towards sustainable tourism and attitudes towards the development of tourism. The following findings relate to the primary research work:

SAMPLE: 478 questionnaires

POSITIVE ATTITUDES: 435

NEGATIVES ATTITUDES: 21

NEUTRAL: 8

Missing cases: 14

Valid cases: 464

The first task is to obtain an overall measure of the attitudes + or – from each subject. Each row was summarised and compared with the mid score of 81 (27x3) more than 81 means a positive attitude less than 81 means a negative attitude.

APPENDIX 2

Pilot Questionnaire
English Version

1 part - your feeling about tourism in island of madeira

Instructions

The following questions are concerned with your opinions about tourism's on the Island of Madeira

1. Approximately what percentage of tax revenues do you believe the tourism industry in Island of Madeira generates.

- 1) - Less 10%
- 2) - more than 10%, but less than 25%
- 3) - more than 25%, but less than 50%
- 4) - more than 50%
- 5) - Have on idea how much

2. Is the tourism industry in your opinion the largest revenue producing industry in our island?.

Yes

No

Do not know

3. Approximately what percentage of Madeira's employment is generated by the tourism industry.

- 1) - Less than 10%
- 2) - more than 10% , but less than 20%
- 3) - more than 20% , but less than less 50%
- 4) - over 50%
- 5) - Have no idea how much

11 Part

YOUR ATTITUDES AND OPINIONS TOWARD COMPONENTS OF TOURISM INDUSTRY

Instructions

In this section please indicate the amount that you agree or disagree with each statement below.

There are no right or wrong answers- We only want to know your opinions . Please circle your response.

	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
1- As a whole , tourists who comes to Madeira are inconsiderate of our island's resources.	5	4	3	2	1
2. If it was not for the tourism industry, the island could not support many of its cultural and recreational facilities.	5	4	3	2	1
3. The tourism industry provides many worthwhile employment opportunities for Madeira's residents	5	4	3	2	1
4. On the whole , the tourism industry regulates and polices its activities well.	5	4	3	2	1
5. I like most tourists as long as they don't move here to stay.	5	4	3	2	1
6. I believe that tourism, in Madeira has caused taxes to go up for Madeira residents because of extra police needs , roads and so on.	5	4	3	2	1
7. I believe that the tourism industry has improved the quality of life in this Island.	5	4	3	2	1
8. This island would be better place if the tourists were not here.	5	4	3	2	1
9. I believe our legislator should support tourism development efforts in our island.	5	4	3	2	1

10. I believe that island government should relax its stutes, if necessary, to stimulate further tourism economic growth in our island.	5	4	3	2	1
11 The tourist that come to Madiera are usually not very friendly.	5	4	3	2	1
12. The tourist do not pay their “ fair share” for the services provided for them.	5	4	3	2	1
13. The tourism industry is good for Madeira’s economy.	5	4	3	2	1
14. Overall the tourismindustry does a good job in supporting the country in which we live.	5	4	3	2	1
15. The tourists I have seen in our shoping malls are stores are generally rude and pushy.	5	4	3	2	1
16. I feel that tourists should be taxed to a greater extent than local citizens pay for the services they use.	5	4	3	2	1
17. I feel the members of the tourism industry (eg. Hotels,restarurants, airlines,taxes and buse transportation) should be taxed greater than other industries in our island.	5	4	3	2	1
18. The tourism industry in our island too comercialzed.	5	4	3	2	1
19. The attraction in our island are not envolved in community activities.	5	4	3	2	1
20. Madeira has a wide selection of quality restaurants.	5	4	3	2	1
21. I believe the plannedexpansions to attract more tourists to the island is good idea.	5	4	3	2	1
22. The attractions in our island are culturally and educationally stimulating.	5	4	3	2	1
23. Island’s hotels are among the best I have seen.	5	4	3	2	1
24. I am in favor of limiting economic growth in the island in which I live.	5	4	3	2	1
25. I feel that the Madeira Island is growing too fast.	5	4	3	2	1
26. Tourism in our island over emphasized.	5	4	3	2	1
27 The airline connections in Madiera are a goodd because of tourism.	5	4	3	2	1

28. There would be little traffic congestion if not for the tourists.	5	4	3	2	1
29. The tourism industry has too much political influence in the island.	5	4	3	2	1
30. The advertising money spent by the Madeira island to attract tourists is a good investment.	5	4	3	2	1

part 111: express your opinion

The following are again concerned with opinions toward tourism.

Listed below are some potential benefits and disadvantages which the tourism industry provides to your family. Please rank these benefits and disadvantages by putting a 1 by the biggest, a 2 by the second biggest and so on.

benefits

..... Entertainments (cultural events)

.....Lower taxes

.....More tax revenue to the island

.....Enhances property values

.....Employment

.....Need for planning

disadvantages

..... Traffic problems

..... Overcrowded areas

.....Increases overall prices

..... Increases crime

.....Higher taxes

..... Segregation of residents

PERSONAL AND DEMOGRAPHIC DATA

I would appreciate if you could answer the following quick question about yourself. All the information you provide will be held in the strictest confidence.

a) Looking at this card, which for these age do you fall into, A,B,C,C,E , or F ?.

show card	A	1)	15-24
	B	2)	5-34
	C	3)	35-44
	D	4)	45-54
	E	5)	55-64
	F	6)	65+

b) Looking at this card , which category best describe your marital status, A,B,C, or D ?.

- A 1) Single
- B 2) Married
- C 3) Widowed
- D 4) Divorced / separated

c) Looking at this card , which of the following categories applies to you , A,B,C,C,D,E , F or G ?.

- A In full- time employment
(30+ hoursa week)
- B In part-time emploment
(Less than 29 hours per week)
- C Student
- D Unemployed
- E Pensioner
- F Housewife /Husband
- G Other*

- * Specify

44.

d) If employed full-time or part-time:

In which industry / type of company ?.

What is your job title?.

What is your position ?.

what qualifications do you hold ?.

45

a) Working in tourism

b) Not working in tourism

c) do not know.

APPENDIX 3

Pilot Questionnaire
Portuguese Version

Estudo sobre a opinião dos Residentes

Questionário a Residentes 1996

411

I Parte - "Sentimento" sobre o turismo na Ilha da Madeira

Instruções

As questões seguintes prendem-se com as suas opiniões sobre o impacto do turismo na Ilha da Madeira.

1. Em sua opinião, qual a percentagem de receitas fiscais geradas pelo turismo, na Madeira.

- Menos de 10%
- Mais de 10% mas menos que 25%
- Mais de 25% mas menos que 50%
- Mais de 50%
- Não faz ideia

2. Será a indústria turística a que produz mais receita na ilha?

- Sim
- Não
- Não sabe

3. Aproximadamente, qual a percentagem de emprego gerado pelo turismo.

- Menos de 10%
- Mais de 10% mas menos que 20%
- Mais de 20% mas menos que 50%
- Mais de 50%
- Não faz ideia

II Parte

Atitudes e opiniões acerca das componentes da indústria turística

Instruções

Nesta secção indique, por favor, o item com o qual está de acordo ou em desacordo. Não há lugar para respostas erradas. Só queremos saber as suas opiniões. Por favor indique a sua resposta com um circulo.

	Concorda absolutamente	Concorda	Não Concorda nem discorda	Discorda	Discorda absolutamente
1. No fundo, os turistas que chegam à Madeira não têm conta os recursos da Ilha.	1 5	2 4	3 3	4 2	5 1
2. Se não fosse o turismo, a ilha não poderia suportar muitos dos seus equipamentos culturais e recreativos.	5	4	3	2	1
3. A indústria turística gere muitas oportunidades de emprego para os residentes da Madeira.	5	4	3	2	1
4. No seu todo, a indústria turística regula bem controla as suas actividades.	5	4	3	2	1
5. Eu gosto muito dos turistas desde que eles não venham para ficar.	1 5	2 4	3 3	4 2	5 1
6. Eu penso que o turismo na Madeira causou subidas nos impostos para os residentes por causa das necessidades crescidas como estradas.	1 5	2 4	3 3	4 2	5 1
7. Penso que o turismo melhorou a qualidade de vida na ilha.	5	4	3	2	1

	Concorda absolutamente	Concorda	Não Concorda nem discorda	Discorda	Discorda absolutamente
8. A ilha seria um lugar melhor se não houvesse turistas.	1 5	2 4	3 3	4 2	5 1
9. Penso que os nossos legisladores deveriam apoiar os esforços feitos no desenvolvimento turístico na ilha.	5	4	3	2	1
10. Penso que o governo regional deveria ser mais permissivo, se necessário, para estimular mais crescimento económico do turismo na ilha.	5	4	3	2	1
11. Os turistas que vêm para a Madeira não são normamente muito simpáticos (calorosos).	1 5	2 4	3 3	4 2	5 1
12. Os turistas não pagam o que deviam em relação aos serviços postos à disposição deles.	1 5	2 4	3 3	4 2	5 1
13. A indústria turística é boa para a economia da Madeira.	5	4	3	2	1
14. A indústria turística é útil para a região em que vive.	5	4	3	2	1
15. Os turistas que tenho visto nas lojas e centros comerciais são rudes e indelicados.	1 5	2 4	3 3	4 2	5 1
16. Penso que os turistas deveriam ser mais penalizados que os residentes no pagamento dos serviços utilizados.	1 5	2 4	3 3	4 2	5 1

	Concorda absolutamente	Concorda	Não Concorda nem discorda	Discorda	Discorda absolutamente
17. Os membros da indústria turística (hoteis, restaurantes, atracções, transporte aéreo, taxi, autocarros, etc) deveriam pagar impostos mais elevados do que as outras indústrias da ilha.	1 5	2 4	3 3	4 2	5 1
18. A indústria turística na nossa ilha está demasiado concentrada.	1 5	2 4	3 3	4 2	5 1
19. As nossas atracções na nossa ilha não prestam serviços à comunidade.	1 5	2 4	3 3	4 2	5 1
20. A Madeira tem uma grande variedade de restaurantes de qualidade.	5	4	3	2	1
21. Penso que os planos para atrair mais turistas para a ilha constituía uma boa ideia.	5	4	3	2	1
22. As atracções na nossa ilha são de interesse cultural e educativo.	5	4	3	2	1
23. Os hotéis da ilha são do melhor que tenho visto.	5	4	3	2	1
24. Acho que deve haver um crescimento limitado na ilha em que vivo.	5	4	3	2	1
25. Acho que a Madeira está a crescer com demasiada rapidez.	1 5	2 4	3 3	4 2	5 1
26. Tem-se dado demasiada importância ao turismo na Madeira.	1 5	2 4	3 3	4 2	5 1
27. As ligações aéreas para a Madeira são boas devido ao turismo.	5	4	3	2	1
28. Haveria pouco congestionamento de tráfego se não fossem os turistas.	1 5	2 4	3 3	4 2	5 1

	Concorda absolutamente	Concorda	Não Concorda nem discorda	Discorda	Discorda absolutamente
29. A indústria turística tem um peso exagerado na ilha.	1 5	2 4	3 3	4 2	5 1
30. O dinheiro gasto em publicidade para atrair turistas para a Madeira é um bom investimento.	5	4	3	2	1

III Parte

Dê a sua opinião

O que se segue liga-se com opiniões em relação ao turismo. Abaixo encontra-se alguns benefícios potenciais e custos que o turismo provém à sua família. Por favor, hierarquize os benefícios e custos pondo 1, para melhor, 2 para o seguinte e assim sucessivamente.

Benefícios	Custos
18 ---- Entertimento	34 ---- Trafego
29 ---- Impostos mais baixos	35 ---- Areas superpovoadas
30 ---- Mais receitas fiscais	36 ---- Aumento de preços
31 ---- Valorização do património	37 ---- Aumento de criminalidade
32 ---- Emprego	38 ---- Subida de impostos
33 <u>6</u> ---- Necessidade de planeamento	39 ---- Segregação de população residente

Dados Pessoais e Demográficos

Gostaria que respondesse às seguintes breves questões acerca de si.
Toda a informação será absolutamente confidencial.

a) Em que grupo etário se posiciona?

40

A	15-24	_____	Homem	41	Mulher
B	25-34	_____			
C	35-44	_____			
D	45-54	_____			
E	55-64	_____			
F	65+	_____			

b) Em que grupo está inserido(a)?

42

A	Solteiro(a)	_____
B	Casado(a)	_____
C	Viuvo(a)	_____
E	Divorciado(a)/Separado(a)	_____

c) Olhando para as seguintes categorias, onde se coloca melhor?

- 3
- A Emprego (Full time + de 30h por semana) _____
 - B Emprego (Part time - de 29h por semana) _____
 - C Estudante _____
 - D Desempregado _____
 - E Pensionista _____
 - F Doméstica/Marido _____
 - G Outros, Especifique: _____

4 d) Se está empregado(a) em full-time ou part-time:

Em que sector / tipo de empresa ? _____

Qual a sua profissão ? _____

Qual a sua posição ? _____

Que habilitações possui ? _____

45- (VIP)

APPENDIX 4

Main Questionnaire
English Version

Resident Survey

Questionnaire

Please indicate your answer by putting a cross in the appropriate box (es).
The following questions are concerned with your views about the economic importance of tourism on the Island of Madeira.

Q1. Approximately what percentage of the tax revenues do you believe the tourism industry in Madeira generates.

0--10%

11--25%

26--50%

more than 50%

have no idea how much

Q2. Is the tourism industry in your opinion the largest revenue producing industry in our island?

yes

no

Q3. Approximately what percentage of Madeira's employment is generated by the tourism industry

0--10%

11--25%

26%--50%

over 50%

have no idea how much.

Your opinions about tourism

Q 4 Below is a list of 23 statements about tourism. To what extent do you agree or disagree with them. Please consider all the statements.

	strongly disagree				strongly agree
4.1. As a whole, tourists who come to Madeira are inconsiderate of our island resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2 If it was not for the tourism industry, this island could not support many of its cultural and recreational facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3 The tourism industry provides many worthwhile employment opportunities for Madeira residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4 On the whole, the tourism industry regulates and policies its activities well	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5 I like most tourists as long as they do not move here to stay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.6. I believe that tourism, in Madeira has cause taxes to go up for Madeira residents because of extra police needs, roads and so on	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.7 I believe that the tourism industry has improved the quality of life in the island	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.8 This island would be a better place if there were no tourists here	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.9 The tourists that come to Madeira are usually not very friendly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- | | s.disagree | | | s agree | |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 4.10 The tourists do not pay their "fair share" for the services provided them | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.11 The tourism industry is good for Madeira's economy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.12 Overall the tourism industry does a good job in supporting the region in which I live | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.13 The tourists I have seen in our shopping malls and stores are generally rude and pushy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.14 I feel that tourists should be taxed to a greater extent than local citizens to pay for the services they use | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.15 I feel the members of the tourism industry (e.g., hotels, restaurants, cafes, attractions, airlines, travel agencies, taxis, rent a car, and bus transportation) should be taxed greater than other industries in our island | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.16 The tourism industry in our island is too comercialized | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.17 I am in favour of limiting economic growth in the island in which I live | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.18 I feel that Madeira is growing too fast | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.19 Madeira is too dependent on on tourism | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

4.20 The airline connections in Madeira are good because of tourism

s.disagree s.agree

4.21 There would be little traffic congestion if not for the tourists

4.22 The tourism industry has too much political influence in the island

4.23 The advertising money spent by the Government and related bodies to attract tourists is a good investment

Q5 The following three statements ask for your views about Government support for tourism

5.1. Our legislators should support tourism development efforts in our island

yes

no

5.2 The growth of tourism needs further encouragement in the island

yes

no

5.3. The planned expansion to attract more tourists to the island is a good idea

yes

no

Q6 About you

6.1 Are you :

Male

Female

6.2 Which age group are you in ?

- 15 - 24
 25 - 34
 35 - 44
 45 - 54
 55 - 64
 + 65

6.3. What is your highest education level (tick one only)

- Less than full primary school
 Primary school
 Secondary school
 Higher education

6.4 Have you carried out educational studies of tourism Yes
 No

Q7 About your work

7.1 Which of the following categories applies to you?

1. Full-time employment
 2. Part-time employment
 3. Student
 4. Unemployed
 5. Pensioner
 6. Housewife / Husband
 7. Other....*

7.2 Do you earn your living through tourism? Yes
 No

7.3 Do you have direct contact with tourists as part of your work? Yes
 No

7.4 Do you own any business related to tourism? Yes
 No

7.5 Is any member of your immediate family involved in tourism as a source of income or employment? Yes
 No

APPENDIX 5

Main Questionnaire
Portuguese Version

School of Management Studies for the Service Sector

Estudo sobre Residentes

Freguesia onde reside:

Por favor indique a sua resposta pondo um sinal + no lugar apropriado. As questões seguintes dizem respeito



aos seus pontos de vista acerca da importância económica do turismo na Ilha da Madeira



Q1. Qual é a percentagem aproximada das receitas fiscais geradas pelo turismo na Madeira ?

- 0-10%
- 11-25%
- 26-50%
- mais de 50%
- não faz ideia

Q2. Considera o turismo o maior produtor de receitas fiscais na nossa ilha?

- sim
- não

Q3. Qual é a percentagem, aproximada, de emprego criado pelo turismo na Madeira ?

- 0-10%
- 11-25%
- 26-50%
- mais de 50%
- não faz ideia



As suas opiniões acerca do turismo

Q4 A seguir apresenta-se uma lista de 23 considerações acerca do turismo. Até que ponto concorda ou discorda? Por favor tenha em conta as seguintes considerações.

discorda concorda
absolutamente absolutamente

		5	4	3	2	1
4.1 Em geral, os turistas que chegam à Madeira não têm respeito pelos recursos da ilha		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2 Se não fosse a indústria turística a ilha não poderia aguentar muitos dos seus equipamentos culturais e de lazer		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3 A indústria turística fornece muitas oportunidades de emprego para os residentes da Madeira.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4 No seu conjunto, a indústria turística administra bem as suas actividades		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5 Eu gosto dos turistas desde que eles não venham cá para ficar		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.6 Penso que o turismo na Madeira provocou subida de impostos para os residentes devido às medidas necessárias, estradas etc.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.7 Penso que a indústria turística melhorou a qualidade de vida na ilha		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.8 Esta ilha seria um lugar melhor se não tivesse cá turistas		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.9 Os turistas que chegam à Madeira não são geralmente muito amigos		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.10 Os turistas não pagam a sua "devida parte" pelos serviços que lhes são prestados		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.11 a indústria turística é boa para a economia da Madeira		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.12 No seu todo a indústria turística faz bem o seu papel no apoio à região onde eu vivo		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.13 Os turistas que tenho visto nas lojas e casas comerciais são geralmente malcriados e antipáticos		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.14 Eu penso que os turistas deveriam pagar mais impostos que os residentes pelos serviços que usam		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.15 Eu penso que os membros da indústria turística (ex: hotéis, restaurantes, cafés, atracções, companhias aéreas, agências de viagens, taxis, rent a car, e autocarros) deveriam pagar mais impostos do que outras indústrias na nossa ilha		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.16 A indústria turística na Madeira está demasiado comercializada		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.17 Eu sou a favor de que se deve limitar o crescimento económico na ilha onde eu vivo		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.18 Eu penso que a Madeira está a crescer demasiado		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.19 A Madeira está demasiado dependente do turismo		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.20 As ligações aéreas na Madeira são boas por causa do turismo		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.21 Haveria poucos engarrafamentos se não houvesse turistas		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.22 A indústria turística tem muita força política na ilha		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.23 O dinheiro gasto em publicidade, pelo governo, e outros departamentos, para atrair turistas é um bom investimento		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Q5 As seguintes 3 considerações relacionam-se com os seus pontos de vista acerca do apoio do Governo ao turismo.

5.1 Os nossos legisladores deveriam apoiar o esforço para desenvolver o turismo na nossa ilha

sim
não

5.2 O crescimento do turismo precisa de mais apoio na ilha

sim
não

5.3 A planeada estratégia para atrair mais turistas para a ilha é uma boa ideia

sim
não

Q 6 Acerca de si

6.1 A que sexo pertence

Masculino

Feminino

6.2 Em que grupo etário (idade) se situa

15 - 24
25 - 34
35 - 44
45 - 54
55 - 64
+ 65

6.3 Qual é o máximo de habilitações que tem (indique uma somente)

Menos do que a escola
Primária completa
Escola primária
Escola secundária
Ensino superior

6.4 Tem estudos em turismo

Sim
Não



Q7 Acerca do seu trabalho

7.1 Qual é o seu caso na lista que se segue?

- 1. Emprego (tempo total)
- 2. Emprego (tempo parcial)
- 3. Estudante
- 4. Desempregado
- 5. Pensionista
- 6. Doméstica / Doméstico
- 7. Outro

7.2 Ganha a sua vida no turismo?

- sim
- não

7.3 Tem algum contacto directo com turistas como parte do seu trabalho?

- sim
- não

7.4 Tem algum negócio relacionado com o turismo?

- sim
- não

7.5 Tem algum familiar próximo relacionado com o turismo como fonte de rendimento ou emprego?

- sim
- não



APPENDIX 6

Knowledge Question
Row Scores

Frequencies

Statistics

TAXREV

N	Valid	397
	Missing	0

TAXREV

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	4	1.0	1.0	1.0
	2	42	10.6	10.6	11.6
	3	74	18.6	18.6	30.2
	4	96	24.2	24.2	54.4
	5	181	45.6	45.6	100.0
	Total	397	100.0	100.0	

Frequencies

Statistics

		BREV	CEMPL
N	Valid	392	396
	Missing	5	1

Frequency Table

BREV

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	358	90.2	91.3	91.3
	2	34	8.6	8.7	100.0
	Total	392	98.7	100.0	
Missing	System	5	1.3		
	Total	397	100.0		

CEMPL

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	6	1.5	1.5	1.5
	2	48	12.1	12.1	13.6
	3	119	30.0	30.1	43.7
	4	118	29.7	29.8	73.5
	5	105	26.4	26.5	100.0
	Total	396	99.7	100.0	
Missing	System	1	.3		
	Total	397	100.0		

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