

Ouverture de ‘Special Issue on Global Tourism Management’*

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Abstract

Tourism is showing how the globalisation is changing the industry’s competition dynamics, with a growing complexity of rules and companies structures. Actually, the traditional tourism system based on the hotels is increasingly threatened by modern and innovative forms of hospitality, which cause a continuous growth of the quantity and a variety of tourist flows. Tourism has shifted from a phenomenon addressed to a limited elite and focused on natural environment to a global and mass phenomenon such as we are now experiencing the Era of Tourism. So the Destination Management becomes the strategic process in which private e public actors manage attractiveness factors and tourist services to affect the global and national market demand.

Keywords: Global Tourism; Global Markets; Global Tourism Management; Tourism Positioning; Destination Management

1. Overture

The globalisation of markets is not comparable to those phenomena that deeply changed the environment from the outside (e.g. the glaciation, caused by the change of the Earth's rotation axis).

The globalisation, in fact, was born inside the socio-economic environment, by large corporations to modify the competition structure and rules.

Tourism, in particular, is showing how the globalisation is changing the industry’s competition dynamics (as for all the global industries), with a growing complexity of rules and companies structures. Global tourism growth, in fact, is not only due to resorts and hotel chains, namely economies of scale based on elementary factors of production (capital, technologies and human labor). It is characterised by complex social and economic phenomena, where the global dimension joins the local one and emphasizes its peculiarities, developing complex dimensional economies, difficult to imitate. This is proved by the Airbnb-Milan case that used Expo 2015 to promote the city in the world and value the experience tourism (Brondoni, 2016).

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□ *The tourism industry in Italy is growing rapidly and in 2016 its revenue was more than 93 billion euros, 36.7 billion of which refers to foreign tourists. The industry counts 176 thousand stable employees, with a peak of 250 thousand registered in the August 2016. The traditional tourism offer is highly qualified and consists of 4,9 millions of beds, 46,1% of which are hotels (33199 businesses), and 28% are camping and tourist villages (2.708 businesses). Furthermore, the rooms have increased from 504.078 to 953167 (+89%) in 3 to 5 star hotels, whereas they have decreased from 434.063 to 138.402 (-68%) in hotels up to 2 star. Nevertheless the 'Italian model' shows a peculiarity represented by family groups who control 2-3 hotels, hindering the achievement of important economies of scale (Bernabò Bocca, Rapporto sul sistema alberghiero in Italia, 2017).*

Actually, the traditional tourism system based on the hotels is increasingly threatened by modern and innovative forms of hospitality, which cause a continuous growth of the quantity and a variety of tourist flows. In this sense, Airbnb Experiences launched a worldwide innovation in Italy (in Rome, Florence and Milan), giving the tourists the opportunity to live exclusive experiences, offered by cities residents. On the Airbnb website, experience hosts are chef, hikers or passionate locals who love sharing their traditions with guests by planning and leading experiences. This initiative offers a wide range of unique experiences proposed by citizens and selected by Airbnb.

In brief, it is not just about rooms and apartments anymore, it is about locations enriched by exclusive experiences for those who want to visit popular cities (from art to gastronomy, design and fashion), with experts on different themes, at limited cost and in short times (time-based competition) (Brondoni, 2014; Brondoni, 2011).

□ *“Live the experience of a tailor for a day in Rome. Welcome to my atelier, where I create my own fashion collection. Choose from simple models that I've created just for you before we enjoy a pleasant walk in the historical center to buy the perfect fabric...I will teach you how to use your fabric to create a stylish and handmade fashion item that fits like a glove”.*

□ *“ Firenze. Learn how to make pasta by hand in a real pasta shop. Learn how to make homemade pasta easily and successfully. If you have flour and water you can make pasta and we will teach the secrets. There is variety of styles with and without eggs (vegan pasta). We will teach you to make ravioli, noodles and gnocchi in different shape and flavours in a real and famous pasta shop in the centre of Florence. After that we will move to Vivanda, our organic restaurant which is round the corner, to taste all together the pasta we have prepared”.*

□ *“ I am a professional truffle hunter and I've been doing this business for 8 years. I've always had a great love for nature and animals since i was young, for this reason my passion has become my job! We'll have a day trip through the woods north of Rome, hunting truffles with the help*

of trained dogs; we will pass through areas rich in history of outstanding natural beauty. After the trip we will go to have lunch at a beautiful location, we will learn The experience could be cancelled if there won't be any truffles in the local area because of the drought (it is a very rare case but it could happen). The trip will take place in the aerea between Monti della Tolfa and the Lake of Bracciano.

□ *“ Bike tour: Florence & the country of Tuscany. An easy bike tour: 14 miles mostly downhill and flat roads. After twenty minutes walking around Fiesole, one of the most characteristic and peculiar landscapes of Tuscany including one of the best views of Florence, we will transfer to the start point, and through a unique rural landscape, we will go back by bike to Florence centre, in that time of the day when the colours of nature turn magic”.*

□ *“ We'll take a tour in one of the biggest and suggestive market of Rome to take inspiration and buy the basic ingredients that we'll need. We'll taste some fresh specialities like mozzarella di bufala, parmesan cheese, ham, seasonal fruit, extra virgin oil and wine. Then I'll take you to my country house, surrounded by roses, where you will learn the secrets of traditional italian cooking art, starting from fresh vegetable picked up from the garden. We'll finally enjoy the meal under the grape pergola with a glass of wine”.*

□ *“Draw and sketch Florence's hidden places. Away from the typical tourist attractions, we will show you hidden treasures neglected by the most popular city tours. This walk is great for those people who have a training (even amateur) in the drawing: we will discover interesting views and corners. Some stops are close to places serving Tuscan high quality foods. The tour will end in a square full of little interesting details usually ignored by people”.*

The traditional mass tourism model is characterized by a national producer's domination, with offers that are standardized, very poor and without variety. In this context, the oligopolistic dominance of a few companies emerged (primarily tour operators and airlines). Unchanging offers and prices constituted the key factors of firm competition, rather than the specific tourism content and the particularities of locations (Brondoni, 2016).

In this sense, experience tourism and sensation tourism create a highly characteristic and volatile offer, abandoning the traditional residential tourism model to meet the new expectations (driven by global mass media) of tourists and travellers based on specialty tourism drivers (Brondoni, 2016). By consequence, for a large part of the market, global tourism changes the nature of the production and consumption of tourism products, providing the tourist experience with innovative new products (Brondoni, 2012).

For experience tourism, tour operators, hotel comfort and service standards are not paramount to a destination's attractiveness, which instead is the case for traditional mass tourism (Capriello et al., 2013; Volo, 2009; Heath, 2000;

Brackenbury, 1996). Experience tourism is a targeted form of mass tourism based on market-driven management, international demand bubbles, price competitiveness, destination image and high product quality particularly in relation to customer sensitivity and perceptions (Brondoni, 2016).

2. The Era of Tourism

Over the past two decades, the global tourism industry has grown like no other. All countries (developed, non-developed and third world) have participated in the virulent growth of the global tourism business.

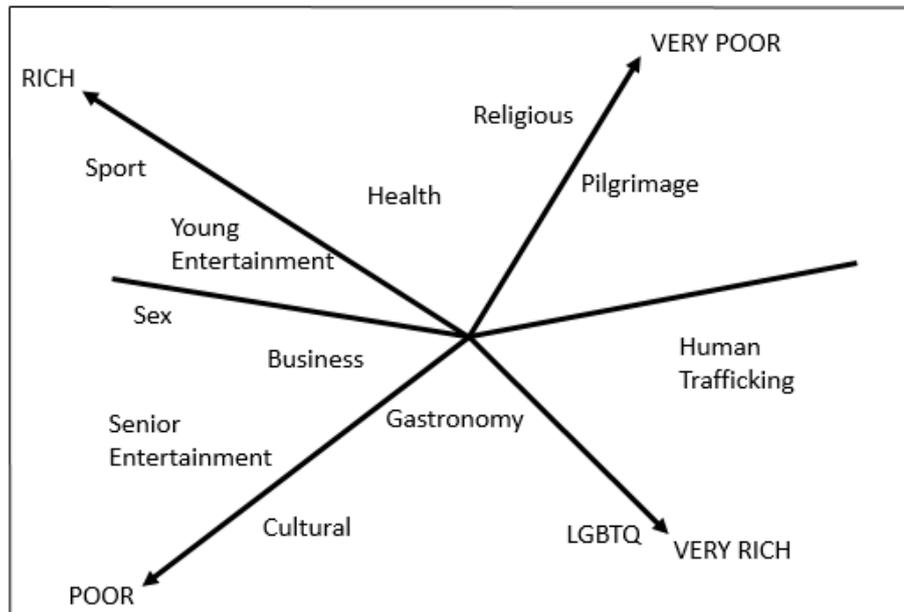
Global tourism is expected to continue to grow in the coming years in countries with high rates of economic growth, in those with stagnant economies and even those in decline (Tisdell, 2013). Tourism is also particularly relevant in terms of the numerous employment opportunities, especially among the young (Brondoni, 2016). Over the years, travel and tourism have transformed into the world's largest economic sector, with enormous ramifications). The rapid growth of the tourism industry has deeply changed the social role played by tourism itself. Tourism, in fact, has shifted from a phenomenon addressed to a limited elite and focused on natural environment in 50s -70s, to a global and mass phenomenon (The Era of Tourism), actually focused on individuals' personality, highlighting their sensations and experiences (Figure 1).

Figure 1: *The Role of Tourism in Affluent Societies*

Years	Tourism Concept	Travelling	Focus
1950-1970	Elective Tourism	National	Natural Environment
1970-1980	Mass Tourism	National	Cultural Environment
1980-1990	Travel Tourism	International	Status Tourism
1990-2000	Cruise Tourism	International	Knowledge Tourism
2000-2010	Personal Tourism	Global	Experiences Tourism
2010-2020	Individual Tourism	Global	Sensations Tourism

Globalisation has defined new landscapes of tourism growth and the emergence of a new tourist profile: traditional tourist motivations and behaviours have become outdated while tourism lifestyles have become more inconsistent and contradictory (Brondoni, 2016). The current global tourism demand is affected by different motivations: destinations; cruise; business; cultural; education; religious; pilgrimages; gastronomic; urban; young entertainment; senior entertainment; sex; LGBTQ; health; medical; reproductive; human trafficking; virtual travelling.

Figure 2: Tourism Positioning



By consequence, it is no longer possible to predict now the purchasing habits of tourists by simply labelling a group as ‘upmarket’ or ‘price conscious’. (Figure 2). In the current tourist market, various paradoxes in tourism behaviour are emerging side by side (Brondoni, 2016).

3. Global Tourism Management

The new challenges facing the tourism are related to the globalization process and its drivers. People become increasingly cosmopolitan and the growing progress in transport and communication boost the touristic flows both incoming and outbound.

The population growth generates substantial expansion in overseas travel and its changing distribution in the world implies the openness of new markets.

The growth of international tourism in the last decades has been impressive, with an annual rate of over 4%, but arrivals in the Asia and the Pacific and in the emerging economies grew by about 6% every year. In terms of individual countries, the ranking of international arrivals presents some constants, such as the prevalence of France, USA, Spain, China and Italy in the top five in the last ten years, but new countries emerge, such as Turkey, Russia, Mexico, Thailand, Hong Kong and India.

These trends allow many cities and territories to become new tourist destinations if appropriately accompanied by business strategies and public policies geared towards attracting people and travellers.

So the Destination Management becomes the strategic process in which private e public actors manage attractiveness factors and tourist services to affect the global and national market demand. An effective process of Destination Management must be able, on the one hand, to analyze, define and manage the attractiveness factors and the various entrepreneurial components of the local system, and on the

other to organize all these elements of offer to intercept market demand in a competitive manner.

But global competition also leads to the emergence of new risks in addition to market opportunities. First of all, a sort of overspecialisation: the dependence on tourism as first export market is a risk because firms and regions must be able to cope unexpected and unfavourable changes in demand from world markets. The tourism industry is extremely sensitive to crises for the discretionary nature of tourism expenditure. In general, tourism firms need to join or link with other companies that supply different components of the whole touristic product, in order to survive or develop in the global marketplace.

The other effect of globalization is linked with the progress in information technology: the tourism industry also uses social media platforms such as Facebook, Twitter, YouTube and travel blogs like TripAdvisor, both on the demand and supply side. And these new technologies have facilitated greater information flows between travelers, giving tourist growing access to product via Internet.

In the same time companies and organisations increasingly integrate ICT into their business model. In this perspective, also small firms can connect directly to consumer and compete with large companies and tourist providers, delivering new forms of entertainment and services in a more customised and individual-oriented offering.

From a management point of view, these opportunities allow new possibility in reducing operating costs and increasing add value for customers, because new technology can dramatically increase the speed of travel and reduce its cost.

But the new frontier of industry are also related to the changing consumer trend and the development of sharing economy.

Considering firstly the new consumer behaviour, in a context of high and rising growth of global tourism flows, the pursuit of new experience-oriented services and symbolic values has led to impressive demand segmentation. The motivation behind traditional travel behaviour spread actually in a strong fragmentation of the classical tourist sectors (sea, mountain, culture) towards niche markets like food tourism, adventure trips, female solo travel, responsible tourism, business and leisure travel, even to the “staycations”, that is a new trends in the direction of sticking around locally to enjoy vacation time. Many of these niches create new opportunity for local tour and activity providers and their communities as more people are looking to boost their local economies with trips close to home. The territory becomes a key lever where tourism growth through the enhancement of environmental, cultural and social aspects is a fundamental challenge for the enterprises, institutions and all stakeholders in the tourism industry.

The new "eso-tourism" approach suggests that everyday cultural experience (concerts, theatre events, art performances), social interaction (interests, myths, personal relationships), consumption activities (shopping places, theme parks) have an immediate implication in the definition of the value and importance of places and in the motivation to travel. In order to promote and develop tourism the quality of products and services should be considered as given and the efforts should be focused on what is indirectly connected to tourism: history, local culture, art and literature.

In this view, the progressive cross-contamination between different types of travel requires bid strategies really aimed at the so-called experiential tourism, to link for

example cultural tourism to the local gastronomy but also to opportunities for shopping or the presence of events.

Finally, the shortening of trips and holiday time has to be considered, which has been a consolidated fact for some years, both for the recent recession and the consequent economic instability and the need to compress significant travel experiences into a short timeframe. Also this change influences strongly the activities offered by the suppliers.

To respond to new consumer trends, so business and industrial policies need to evolve rapidly to intercept new demand in terms of competitiveness and sustainability. As regards competitiveness, priorities concern diversification, product development towards growing market segments, and new business model, searching high-value products and low-price offers.

On one side tourism enterprises need new interventions to support the production process, improving skills of employees, promoting standard and quality certification, creating clusters and network among SMEs and strengthening links to market. The public policy should on the other side reinforce these efforts simplifying regulations and promoting long term investment in transport and infrastructure to increase the location attractiveness, reduce seasonality and spread tourism revenues.

But the new challenge in tourism is also the strengthening the sustainability and addressing issues of responsibility towards the impacts of tourism.

Global climate change affect citizens and consumers and more travelers are aware of the impact that their experiences have on the planet opting for sustainable measures in their travel.

It is no coincidence that the UN has indicated 2017 as the International Year of Sustainable Tourism, asking for advancing “the contribution of the tourism sector to the three pillars of sustainability – economic, social and environmental, while raising awareness of the true dimensions of a sector which is often undervalued”

The tour provider must offer more sustainable service of travel and stay because the travellers reward and privilege companies that embody these values, in order to reduce the carbon footprint of visit, promote resource efficiency and conserve natural and cultural heritage.

Concerning the theme of social sustainability of tourism, it is also necessary to consider the diffusion of forms of sharing economy in tourism, with services provided on a peer-to-peer or shared usage basis, in some way creating competitive alternatives to traditional tourism activities.

In this process, both technology and cultural shifts are provoking a sort of drastic revolution in the industry structure of tourism, with the large diffusion of digital distribution platforms and access to them through mobile media, and new channels of private accommodation (Airbnb and Couchsurfing), transportation (Uber and Blablacar), dining (EatWith and Feastly), travel planning (Vayable and VoomaGo). The process represents a sort of progressive disintermediation of the industrial structure of tourism sector, pushed by the actual more autonomous approach to travel consumptions but also by structural reasons, both economic (low cost) and technological (easy access and simpler forms of mobility and accomodation). The result is the drastic downsizing of traditional travel agencies and tour operators, in favour of on-line agencies and low-cost providers selling their product on the

Internet, and non-professionals who decide to rent out their house/apartment or rooms/beds to supplement their main income.

Not by chance the strategic 2020 document of the Copenhagen Destination Management Organization affirms “*the end of tourism as we know ita future beyond tourism with something much more interesting and personal: a future of hosts and guests and the shared experience of localhood.*”

The opportunities deriving from this new forms of sharing economy for tourism nowadays allow for enlarging the market to less visited destinations, more users and suppliers, more consumer options and tourism experiences.

The impact in terms of entrepreneurship and innovation should not hide the spread of new risks in terms of minor protection of consumers, loss of tax revenue and in general the resurgence of unfair competition for traditional more regulated firms and operators

In effect the empirical data about the tourism arrivals in Europe shows that the leading regions in terms of inbound tourism tend to be smaller areas with strong seaside or mountain destination appeal and marked natural, historical or cultural vocations, but also specific industrial structures and managerial strategies able to qualify the tourism offer in terms of services, infrastructure, and entrepreneurial capacity.

If we consider the attractiveness capacity referring to the resident population, in effect small seaside-oriented regions (Illes Balears, South Aegean, Canarias, Algarve, Corse) and some mountain-oriented ones (Bolzano, Tyrol, Valle d'Aosta) emerge, with the great capitals that lose positions.

But considering the number of establishments (hotels and complementary accommodation) and the structures by number of beds, the data reveal a very fragmented industrial configuration in countries like Ireland, Italy, the United Kingdom and Greece. The wide diffusion of familiar and traditional accommodation, linked to hospitality forms such as bed & breakfast or small houses-vacation (so-called ‘Irish cottages’ phenomenon, or ‘pensione Maria’ in Italy) emphasize the issue of the size of the offer.

If sharing economy phenomena and bid customization thanks to new Internet Technologies, allow profitability also to small business, there is still a problem of economies of scale and production organization. And so the trade-off between size and efficiency, new consumer needs and market dimension remain the real challenges that the tourism industry will face in the coming years. From this point of view the central role of entrepreneurs and managers in the tourism industry emerges. They have to orient their strategies towards product and process innovation, economies of scale but also towards territorial branding strategies and experience oriented services.

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