TOURISM DEVELOPMENT

Growth, Myths and Inequalities

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Edited by

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Peter has two streams of current research. First, the roles and responsibilities throughout the tourism value chain in climate change. The approach thus far has been to identify a series of policy and business paradoxes (cf. http://www. icis.unimaas.nl/eclat/Paris/papers/burns_bibbings_paper.pdf). The findings have prompted the first of a series of online surveys to further investigate attitudes and values among various stakeholder groups.

The second stream, 'A Secret History of Holidays' (funded by the Community University Partnership Programme in cooperation with the Clinical Research Centre for Health Professions and Oxford Brookes University) uses private archive material and interviews to capture experiences and memories of the first generation of post-war tourists. Outputs include a short film, which will be presented at the CENTOPS 2007 conference.

Peter is the author of numerous papers on sustainable tourism and is the author of the internationally acclaimed publication, *An Introduction to Tourism and Anthropology*, which has been translated into both Japanese and Portuguese.

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Kathleen Baker is currently Senior Lecturer in the Department of Geography at King's College London. Kathy was born and brought up in south India and came to England for her secondary education after which she graduated in Geography from King's College London. Her academic interest in India began in 1972 when she joined the School of Oriental and African Studies, University of London, and conducted fieldwork for her PhD on impacts of green revolution technology in western Uttar Pradesh in north India. After joining SOAS as a member of staff in 1979, she re-focused her research on West Africa, her main interest, once again, being rural livelihoods and particularly agricultural development. More recently since returning to King's College, Kathy has resumed her work in rural north India and has also become interested in tourism and its various impacts on socio-economic development. Kerala has proved a particular source of inspiration in this regard, owing to its unique set of programmes, which target the poorest. Her research on the potential of tourism to bring about socio-economic development is ongoing.

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His main research interests are the sociology of anti-tourism and sustainable tourism. In particular, Jim has critiqued ecotourism and defended mass tourism in the academic and media debates about ethical travel.

Currently he has two research projects underway: demystifying the 'ethical tourism' debate and an investigation into the formalization and regulation of young people's leisure in the name of social inclusion.

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After studying social anthropology and extensive travel in Indonesia, Stroma Cole started her own tour operating business. For 6 years she led small groups all over the Indonesian archipelago. Following a period of consultancy with UNESCO and ADB she returned to the UK and took up her post at Buckinghamshire Chilterns University College. Stroma continued to visit the remote Ngadha villages on the island of Flores to study the effects of tourism. She completed her PhD in 2003 and has published extensively. She continues to research tourism in Indonesia and other less economically developed countries. She is chair of Tourism Concern.

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On the one hand, as a visiting academic at the University of Manchester, he has been working collaboratively (with Keith Sutton at the School of Environment and Development, (SED)) on Greater Cairo's housing crisis (submitted to *Cities*) and urban growth problems (published in *Cities*). His research focuses on rehabilitation and gentrification of historical Cairo districts for tourism development (published in *Habitat International* and *International Development Planning Review*), and the impact on the surrounding urban poverty areas and population eviction within cemetery informal settlements (published in *Cities of the Dead* and the journal *Arab World Geographer*) and Zabaleen Garbage Collectors (published in the journals *Environment and Urbanization* and *Habitat International*). Currently he is working on two research collaborations: Cairo's late 19th century and early 20th century European architectural heritage and Greater Cairo's suburban vacant dwellings.

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Paul Peeters studies the relations between tourism transport and the environment, with a focus on climate change. He started his career as an aircraft engineer at Fokker Aircraft, and worked then as a researcher at the Dutch Energy Research Centre on wind energy. In 1988 he took up research on transport and environment at several Dutch institutes and his own consultancy since 1995. Since 2002 he has been a professor teaching and researching sustainable transport for tourism at the NHTV Centre for Sustainable Tourism and Transport.

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Valerio Simoni graduated in social anthropology from the University of Neuchâtel, Switzerland, with a dissertation on tourists' constructions of authenticity in Ladakh, India. Since 2005, he has been a PhD researcher at the Centre for Tourism and Cultural Change, Leeds Metropolitan University. His current research centres on informal encounters between foreign tourists and members of the local population in Cuba. In the course of 7 months of ethnographic fieldwork in Cuba, Valerio has been observing and participating in these ambiguous transnational encounters. His interest is in tourism 'borderzones' and 'contact zones', and on related issues of informality, harassment, instrumentality, friendship and romance. His project is to explore the emerging, dynamic and contested nature of these issues, capturing ethnographically the unfolding as well as the implications of a wide range of tourist encounters from the multiple perspectives of visitors and visited, and to draw parallels between the Cuban case and other tourism destinations.

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Foreword

As a strategy to promote development worldwide, key targets were defined for the achievement of the Millennium Development Goals by 2015. The international response was vocal and enthusiastic. Tourism, in particular, is seen as having great potential for shifting wealth from rich countries to poor, and in some cases directly at the level of families and villages. But we are already half way through the time set for the completion of these noble goals. At this point we need to ask what is happening in practice in terms of implementation and a number of questions arise that this book, in a broad sense, seeks to address.

How far can tourism contribute to the development of a country or a community? Where should we see the position of tourism in the context of the difficult relationship between economic growth, equitable distribution, and sustainable development? And who ultimately profits from tourism?

Predominantly focusing on the issues of alleviating poverty, reducing gender inequities and promoting environmental sustainability, to mention just a few, the contributors to this book are exemplary in the way they deal critically with the opportunities and risks offered by tourism. This publication is an important contribution to the discussion of the relationship between tourism and development. It looks at current approaches that offer new and exciting insights. Nevertheless, there is a continuing need for a critical analysis of the complex dynamics between tourism and the Majority World, without which the opportunities offered for sustainable development will not be realised.

The German NGO GATE is concerned above all with the social and cultural aspects of tourism. Approaching the issue primarily from an ethnological perspective, GATE members advocate socially responsible and sustainable tourism. It was in this context that in 2005 GATE first began working together with Professor Peter Burns and Dr Marina Novelli. In contributing towards the realization of this book, we are delighted to have been able to continue our cooperation with the Centre for Tourism Policy Studies (CENTOPS).

Silke Krause and Sarah Fischer
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We are particularly grateful to all those colleagues who have refereed the chapters, whose names remain anonymous for the purpose of maintaining integrity.

Introduction

The Majority World[1] Development and Tourism

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This introductory chapter provides an historic context for the book's central theme, which is the complex relationship between the Majority World, development, and tourism. The three key issues of wealth creation, growth, and redistribution provide the framework by which the 'development' theme was conceived, with advances into the most recent debates on tourism and its role in the wider sustainability agenda.

Development is a highly ambiguous term which, put in a simple way, can refer to a 'process through which a society moves from one condition to another' (Sharpley, 2002:23). It is generally used to describe the dynamics resulting from processes of national economic and social transformation, 'effectively a synonym for more or less planned social and economic change' (Hobart, 1993:1). Hobart also argues the importance of the use of metaphors in the development discourse – 'nature' metaphors such as roots and seeds, and spatial metaphors such as up/down, centre/periphery are examples he gives; in particular, he cites three ways in which development is described in the Indonesian language:

> *Perkembangan* from… 'flower',… growth which requires little external intervention. *Kemajuan,* 'progress', tends to be linked to Western liberal economic and political ideas, with connotations of rationality. The third, *pembangunan*, from… 'get up, grow up, build' is the term favoured by government officials and developers (Hobart, 1993:7).

Pembangunan is preferred by governments because it places importance on their role in the process: implying that development will not happen by itself, but needs carefully thought out government intervention. In somewhat controversial mode, Adams (1990) gives a description of development that seems to blend common sense with cynicism:

> Development ought to be what human communities do to themselves. In practice, however, it is what is done to them by states and their bankers and 'expert' agents, in the name of modernity, national integration, economic growth or a thousand other slogans (Adams, 1990:199).

He continues by asserting that development as a concept, is a 'semantic, political and indeed moral minefield' (Adams, 1990:4). Todaro (1982) argues that development needs to be framed by the overall social systems and cultural dynamics of a country. This means taking a holistic view of development and not one framed solely by economic enlargement measured, for instance, by the achievement of growth targets – such as gross national product (GNP) – not linked to some sort of equitable distribution of outputs (Thirlwall, 1989:8). The term 'holistic' is becoming increasingly central to the thoughts of the present editors as they consider tourism development. Holism means approaching subjects as systems, rather than studying their component parts in isolation from each other. A systems approach infers that phenomena are more than the sum of their parts, a fitting starting point to study the complex relationship between the Majority World, tourism, and development.

Development as a concept has been most vigorously thought about during the post-war years with the declaration of the first United Nations 'Development Decade' of the 1950s. At that time and continuing virtually unchallenged into the second Development Decade of the 1960s, development was seen strictly in economic terms. Donnellan (2005:23) describes development as a process of economic and social transformation and argues that development is 'a qualitative concept that entails complex social, cultural and environmental changes' rather than solely economic growth and diversification of a country's economy. In the early development decades, traditional structures of production were seen as incompatible with growth. For countries undergoing decolonization (and other poor countries), this meant placing new emphasis on industrialization with the deliberate and often planned consequence of shifting resources away from primary production (agriculture and rural activities) to the 'modern' manufacturing, industrial and, to some extent, service sectors, referred to as the rural diversification process (Novelli and Gebhardt, 2007).

The consequence of these post-war efforts, encouraged by former colonial powers and the burgeoning World Bank, was rapid urbanization, introduction of consumerism, neglect of rural development, except for the controversial introduction of chemically-dependent, capital-intensive methods (Adams, 1990:7; and see van der Ploeg's *Potatoes and Knowledge* in Hobart, 1993), and the creation of domestic dualism where enclaves of capital-intensive modern industries producing sophisticated goods for export exist side-by-side with traditional, low-technology modes of production orientated to unsophisticated and undemanding domestic markets. Todaro describes one aspect of dualism as:

> the gap between the rich and the poor and between modern and traditional methods of production shows signs of growing even wider… it is the very growth of the stronger or 'superior' component of dualistic societies that keeps down, or at least is achieved at the expense of, the weaker or inferior element (Todaro, 1982:94).

The idea of dualism within a nation, i.e. advanced industrial/economic enclaves and backward subsistence farming, can be criticised on the grounds that it assumes undifferentiated homogeneities within each side of the duality, inferring that no benefit leaks out of the advanced enclave and the rural areas remain traditional and poor; however, as Isaak (1995:244) argues:

> The reality of dualism… in even the most developed technological economies
> shatters the myth that one homogenous national economy can be managed with
> supply-and-demand tools from a centralized cockpit.

Todaro's comments (and to a lesser extent Isaak's) on the dualistic consequence
of development are, in part, a reflection of (a) measuring 'success' in develop-
ment solely by means of the achievement of growth targets in GNP or GDP
(which in any case takes no account of informal or non-monetary exchange) as
was the case in the first two Development Decades, and (b) prescient responses
to the inevitability of urban drift. As Toye (1993:24) remarks, 'it is important not
to confuse economic growth, the expansion of the measured outputs of goods
and services, with development.' In discussing the social cost of capitalist growth
in this dualism context, Isaak argued that:

> the priority of economic growth accentuates the distance between the winning and
> losing social groups, constantly redirecting resources to the winners in order to
> make them self-fulfilling prophecies and "locomotives" for the economy. To the
> extent capitalist incentives are inevitable, so are manifestations of social inequality
> (Isaak, 1995:241).

Isaak does not claim that such events are inescapable, but rather that 'the dual
economy model can be a powerful mode of explaining growth-rate differences
in… market economies' (Isaak, 1995:244).

The third decade of development saw the World Bank shift its official
position from relative indifference about the distribution of the benefits of
development, towards 'basic needs' focusing on a 'life sustenance' approach
(Thirlwall, 1989:8; Toye, 1993:129). Goulet (1971) saw these basic needs as
being one of three components of development, the other two being self-esteem
(self respect and independence) and freedom (from 'want, ignorance and
squalor') with respect to self-determination. The World Bank (1991:4) gives a
very comprehensive overview of development stating:

> The challenge of development, in the broadest sense, is to improve the quality of
> life. Especially in the world's poorest countries, a better quality of life generally calls
> for higher incomes – but it involves much more. It encompasses … better education,
> higher standards of health and nutrition, less poverty, a cleaner environment, more
> equality of opportunities, greater individual freedom, and a richer cultural life.

Altogether, development embraces a large number of different dimensions,
which is why 'there is no single, unequivocal definition' of it (Pearce, 1989:6).

It has been generally argued (Schumacher, 1973; Korten, 1980; Chambers,
1983) that, for the successful achievement of development goals, bottom-up
planning, participation and decentralization are necessary. In the 1970s top-
down approaches to development did not result in the economic improvement
and social benefits that had originally been expected (Turner and Hulme, 1997)
but rather led to dependency, inefficiency and slower economic growth as some
theorists argued at the time (Willis, 2005). The 1990s were marked mainly by an
emergence of increased environmental awareness and a focus on participation in
development approaches (Adams and Hulme, 2001).

The advantage of material development, as Thirlwall (1989:8) reminds us, is 'that it expands the range of human choice'. The implication that this materialistic approach to development holds for Marxists (for example Peet, 1991; Pepper, 1993) and ecocentrists (Adams, 1990) is that development is simply equated with modernization (technocentrism), taking no account of what is actually happening between regions and nations, that is to say, economic dependence. Pepper (1993), in his discussion on anthropocentric analysis of green political thought, asserts that:

> Greens, anarchists and neo-Marxists of the new left unanimously see that 'modernisation' is really *dependent development* in disguise… in capitalist world 'development' underdeveloped nations are essential counterparts of the existence of developed ones. In other words, underdevelopment *results from* and is a vital feature of capitalism (Pepper, 1993:26, italics in original).

What emerges from the above, is that while the old apologists for trickle down economics (Bauer, 1981) might have claimed that the absolute poor are better off than they were at the beginning of the colonialist era, it is distribution of income and wealth and not absolute measures of GNP that determine people's health, happiness and, in effect, the degree of control they have over their own lives ('freedom' as Goulet, 1971, termed it above).

The Development Debate

Ghatak (1995:34) asked 'Is per capita real income a valid index for measuring development of the LDCs?' He offered four suggestions as to why the answer to this question might be 'no'. In the first instance Ghatak argued that, without redistribution of income derived from economic growth (a phenomenon which may be called 'economic enlargement'), there can be growth but no development. His second point was that, unless the growth rate in economic outputs is capable of outstripping populations' growth, then here too, growth without development is possible. Third, quantifying or measuring growth is often muddled in the case of the Majority World through 'artificial' changes to per capita real income (both upwards and downwards) brought about by data being changed in 'a world of floating exchange rates' (Ghatak, 1995:34). Finally, he referred to 'dual' societies, where the gap between the very rich and the very poor is gravely significant and can be seen as evidence that growth without development has indeed taken place and is not difficult to find. Definitions that imply 'growth' and 'development' to be the same thing or that assume development as a natural corollary of growth (cf. Bauer, 1981 especially his Chapter 11, *Broadcasting the Liberal Death Wish*) should be rejected. In this sense, the definitions by Balaam and Veseth (1996) and Todaro (1982) are still useful because they remind us that benefits to civil society are an essential part of development.

Balaam and Veseth in their treatise on the international political economy, define development as:

> The ability of a nation to produce economic wealth, which in turn transforms society from a subsistence or agricultural-based economy to one where most of

society's wealth is derived from the production of manufactured goods and services (Balaam and Veseth, 1996:312).

In defining development economics, Todaro links the traditional concerns of economists (efficient use of scarce resources) with elements of political economy, defined by Isaak (1995:298) as 'the study of the patterns of positioning and collective learning between nations and peoples that either preserve or change the inequality between them' with a view to setting up analytical mechanisms and theoretical perspectives that enable the study of those processes necessary for the structural and institutional transformations of entire societies in a manner that will bring the fruits of economic progress to the broadest segments of their populations (Todaro, 1982).

This implies the need for recognizing the essential role of government planning, which remains somewhat at odds with the above-mentioned position concerning economic 'reality' (Isaak, 1995:7), highlighting one of the major political paradoxes about development: the extent to which market forces should dominate. In addition, Hobart argues that there is a temptation to define development 'as problem susceptible of a solution'. Interestingly, this is precisely how the United Nations Development Programme (UNDP) suggests development should be thought about. In prescribing how project documents requesting UNDP funding should be completed, the UNDP bemoans the fact that 'Identified projects are often not presented as problems to be solved' (UNDP, 1993:11), they continue:

> For many projects identified in the country… a problem analysis as a remedial effort ought to be done as the first step in project formulation in order to determine more precisely the nature and validity of the underlying [development] problems.

The underlying assumption by the UNDP is that their technical experts have the ability to identify not only the problem, but the solution. Given the UNDP's experience of development projects, this is reasonable conjecture. However, as Hobart implies, the notion of 'objective knowledge' (which underpins the idea of problem analysis and project formulation) can be considered as a construct by development experts, he continues:

> the popular proposition that successful innovation requires the "translation" of an alien idea into an indigenous idiom is revealed as hopelessly simplistic as well as being insidious (Hobart, 1993:19–20).

This quote, especially its reference to 'alien idea' (i.e. non-indigenous), encapsulates the cultural arguments that surround both the definition of development and development itself.

While we started this section by suggesting that growth can take place without development, de Kadt makes it quite clear that development cannot take place without economic growth:

> Most Less Developed Countries cannot hope to create acceptable living conditions for the majority of their people without continuing economic growth and for many of them, especially the large number of smaller tropical mini- and micro-states, tourism represents one of the few apparently viable routes for such growth (de Kadt, 1992:75).

de Kadt's arguments are based around the involvement of a wide range of social and political institutions in the development process, thus, while he does not specifically define development, it may be inferred that his definition would be a holistic one in which 'the most formidable task on the road to sustainable development, and tourism development, is that of *building the institutions needed for policy implementation*' (de Kadt, 1992:73, italics added). This is a point of real importance because it raises issues of power and control and, by implication, the need for appropriate scale, equitable distribution of benefits, long-term accounting, and (above all) the notion of the state supporting and encouraging regional and local initiatives. de Kadt includes NGOs and community participation citing Murphy's (1985) view that tourism should be developed and managed as a local resource where local needs and priorities take precedent over the goals of the tourism industry (though we may take issue with Murphy's position by arguing that it can only work where sophisticated local participatory mechanisms and institutions are in place). Definitions of development should allow links to be made between economic growth, biological implications (health, life expectancy, etc.) and individual welfare. The UNDP (1990) do this through their Human Development Index which is 'a yardstick that provides a broad method by which inter-country and inter-temporal comparisons of living standards can be undertaken' (Ghatak, 1995:38). While not exactly a definition of development it provides a logical way of monitoring whether development is having an effect on human welfare within a given country.

Dependency Theory and Beyond

A few words on dependency theory are necessary because many of the most widely cited references on the Majority World, tourism, and development are clearly rooted in this arena. Dependency theory seeks to examine 'the effects of imperialism on overseas territories in an attempt to explain the roots of backwardness' (Hoogvelt, 1982:165). The basic assumption for dependency theory is reliance of what were called 'Third World' countries (to use the dated terminology of the genre) upon the economic policies of the 'developed' countries. A further corollary asserted by dependency theorists is that of underdevelopment, whereby dependency results in persistent low levels of living, as dependent economies are distorted towards the needs and predilections of the metropolitan centres; growth for the underdeveloped economies is 'a reflection of the dominant countries' (Peet, 1991:45). According to Reid (2003:82) dependency theory regards development as 'a movement of resources from the LDCs to the developed world'. For dependency theorists, development and underdevelopment are two sides of the same coin: surpluses from the exploited countries, generated first through mercantilism and later through colonialism, had the combined effect of developing the metropolitan countries and underdeveloping the peripheral countries. The dependent situation became heightened with the development of local élites, 'whose economic interests became … intertwined with … the advanced capitalist states, and whose cultural lifestyles and tastes were a faithful imitation of the same' (Hoogvelt, 1982:166).

Two writers featured heavily in the development of dependency thinking. The anti-imperialist work of Raúl Prebisch (1950), a former head of the Central Bank of Argentina, one time director of the United Nations Economic Commission for Latin America (ECLA) and Secretary-General of the 1974 United Nations Conference on Trade and Development (UNCTAD) which established the NIEO, and the neo-Marxist, André Gunder Frank (Peet, 1991:45) who reworked and furthered Baran's (1967 in English, 1957 in Spanish) work on the umbilical links between dependency and underdevelopment.

Prebisch was one of the first economists to 'question the mutual profitability of the international division of labour for developing countries on existing lines' (Thirlwall, 1989:370). Prebisch attributed Latin America's underdevelopment to the structural characteristics of the global system, arguing that 'Latin America's peripheral position and primary exports were the causes of its lack of progress, specifically because of a long-term decline in the terms of trade of the periphery' (Peet, 1991:44), wherein development, it can be asserted, becomes 'impossible':

> Rich states have dynamic economies committed to technological advancement in which monopoly corporations and effective labour unions can hold up the prices of manufactured goods. Meanwhile poor states have feeble investment patterns and a disorganized labour force… This produces a consistent tendency towards increasing disparity between the prices of manufactured goods and raw materials that makes development impossible (Waters, 1995:109).

Through this structuralist argument, Prebisch (1950) suggested that the solution to underdevelopment was through modernization, that is to say, investment in industrialization, the corollary of which was a move away from primary production. The main support structure for this programme of industrial investment was the development of import substitution through endogenous growth, 'infant industries' defended by fiscal and non-fiscal tariffs. Import substitution failed as a long-term policy, becoming a remedy 'seen as a cause of the economic illness' (Peet, 1991:45). Wages did not rise to stimulate domestic demand, balance of payments worsened and income distribution became less equitable (Hoogvelt, 1982:168). As Todaro (1982:314) explains, four undesirable outcomes arose from it. First, that foreign firms taking advantage of mobility of production and excessive tax breaks were a major (unintended) beneficiary; second, governments often subsidized importation of the heavy plant and equipment necessary to set up factories; thirdly, changes to official foreign currency exchange rates designed to help industrialization through cheap importation of capital which further encouraged capital-intensive production thus inadvertently disadvantaging the export value of primary goods which (because of the exchange rate) become expensive on world markets. Finally, the intention of forward and backward linkages becomes distorted by the inefficiencies inherent in a non-competitive domestic market.

Frank (1966; 1970) was critical of Prebisch's modernization perspective where Latin America's subservient position relative to the USA and the industrialized world was caused by unequal trade, rooted in an international division of labour wherein the Majority World was destined to be the producers and exporters of commodities, the prices of which were set by commodity markets in those same developed countries. For Frank, 'attributing underdevelopment to traditionalism

(or feudalism) rather than capitalism is an historical and political mistake' (Peet, 1991:46). Frank's most tangible contribution to the dependency debate is his bringing to the forefront of the development discourse, the concept of the world being polarised into interdependent 'metropolis centres' (usually meaning the industrialized nations of the north) and 'satellite peripheries' (former colonies and other primary producing countries of the south).

Hoogvelt (1982) claims this dependency framework, and Frank in particular (with his focus on 'lumpendevelopment' being promoted by a 'lumpen-bourgeoisie') continuously misses the point; the issue of whether or not élites deliberately act as tools for the new imperialists is a red herring. At a deeper level, what remains as the continuing paradoxes of dependency thinking is its focus on the Majority World as being locked into pessimism (Kay, 1989): a 'negative self-fulfilling prophecy' as Isaak (1995:195) describes it, and the unresolved issue of 'strident nationalism' (Toye, 1993) as a response to the disadvantaged position of the Majority World in the international political economy.

In the broadest of terms, the development of development thinking has been subsumed by the two ideologies: Liberal and Marxist. This disjunctive can be summarized in the following way:

> Whereas liberals perceive underdevelopment as a *condition* of countries that have not kept up with leaders in the world economy, dependency theorists view it as a *process* inherent in an asymmetrical system that continually restructures developing countries into underdeveloped positions (Isaak, 1995:194, emphasis added).

In this view, developing countries are locked out of 'normal' development by at least four factors. First the entrenched power of international organizations such as the World Bank and World Trade Organization, the procedures of which are designed to best suit the developed world (Harrison, 1993). Second, a private sector banking system wherein exists 'an accelerated transfer of wealth from the poor countries to the rich' (George, 1989:5).

Third, the existence of multinational corporations headquartered at centres within the developed world where countries vying for productive activity and investment from these corporations are thrown into competition with each other. This rivalry places many Third World countries at a particular disadvantage, for example 'unless nations possess large quantities of resources, like raw materials, capital, technology and the like, the tactic of closing off your territory to [multinational corporations and foreign direct investment] in today's world is a little like shooting yourself in the foot' (Balaam and Veseth, 1996:352). The fourth factor present in this 'locking' process is the international transport system that is geared, for the most part, to the needs of the rich countries (Britton, 1982).

This section started by noting Hobart's (1993) use of metaphors in the development debate and ended with Britton's (1982) assertion about global systems that are geared towards the needs of the developed world. The threads that draw these arguments and counter-arguments together, such as growth and distribution, industrialization and primary products and the whole core-periphery controversy provide a theoretical and analytical backdrop for the idea that while the rhetoric of tourism planning often incorporates cultural awareness and environmentalism, it remains dominated by the economic principles

espoused by Rostow generated at a time when the political agenda was very different from the post *glasnost* period and the collapse of the Soviet Union and empire. Curiously, the terms 'development' and 'industrialization' are interchangeable, and it is this, along with the view implied from their position, that development is (in the ironic words of one observer):

> Capital accumulation; a technocratic task of grand designs, simultaneous equations, balanced growth, all plannable with mathematical precision … that [will] emancipate primitive societies from backwardness and modernize them (Mehmet, 1995:56).

Mehmet goes on at length to establish that, of course, this is precisely what development is not. However, given the holistic view of tourism that clearly needs to be taken, a more elaborate definition of development is called for. Isaak offers such definition in his analysis of the postmodern world economy:

> "Development" is defined as spontaneous economic change within a nation not forced upon it from without. Development goes beyond mere growth (or the optimization or expansion of what already exists): it implies that something new and distinctive is being produced by spontaneous design or planning that makes a nation … less dependent upon others (Isaak, 1995:22).

Even so, the first sentence here represents a narrow view as it tends to exclude, for example, change forced upon nations by the actions of the IMF/World Bank and their structural readjustment programmes, though clearly Isaak is right to describe development as going beyond mere growth. In this broader context, the geographer Peet describes development as:

> Change is a complex of related features of social existence – economic, cultural and political. Change is in a positive direction, advance occurs, things are getting better over time. All these features need not change at the same time, nor even in the same direction. Economic development can occur with cultural impoverishment, but the general direction has to be one of positive improvement for development to be said to occur (Peet, 1991:3).

By including in his description the notion of culture and 'social existence' Peet gives clear acknowledgement, just as Isaak does, that development is not just about economic enlargement.

The Open University Third World Atlas (*sic*) gives further clarity to the respective positions of Isaak and Peet by describing the changing nature of what might be meant by development:

> Since the Second World War what has been understood by development has … changed, from an emphasis on economic growth to a view of development encompassing the whole of society and implying cultural and political as well as economic and technical change (Thomas *et al*., 1994:10).

This is clearly a reference to Rostow's interpretation of development which still has its (sometimes unwitting) followers, such as Balaam and Veseth, who offer a narrow economic version of development by defining development as:

> The ability of a nation to produce economic wealth, which in turn transforms society from a subsistence- or agricultural-based economy to one where most of

society's wealth is derived from the production of manufactured goods and services (Balaam and Veseth, 1996:312).

It is this kind of definition that would describe the actions of a nation (such as Laos, Cambodia, or Madagascar) in destroying their rainforests through uncontrolled logging in return for foreign exchange as 'development'. Balaam and Veseth's definition would not enable nomination of any 'development' to, for example, Samoa which produces virtually no manufactured goods and very little by way of services (including tourism). It is a definition that clouds or avoids the issue of sustainability.

This notion of sustainability has to be a central concern. Sustainability has been defined (in a deliberately provocative mode) as 'that which you can go on doing forever' (Porritt, 1995). Here lies a central dichotomy for followers of 'normal' development, in that very little activity that goes towards a goal of 'everybody fed, clothed and happy' (Hoogvelt, 1982:208) can go on forever.

Adams, in his discussion on green development, describes development as 'what human communities do to themselves' (Adams, 1990:199). This definition is too broad, however and, thus, as Adams acknowledges, remains unrealistic. He goes on to say:

> … it is this reality of development, imposed, centralizing and often unwelcome, that the 'greening' of development challenges … [throwing] … attention back on the ethical questions that underlie the idea of development itself … [recognising] … that societies are 'developing' whether or not they are the target of some specific government 'development' scheme (Adams, 1990:199).

These views are characterized by the present thinking from the UNDP through its sustainable human development philosophy, which is supposed to underpin all of its undertakings.

Over the past 20 years, increasing focus has been placed on development that is sustainable from a social, cultural and environmental point of view (Harrison, 2001). While the use of tourism as a tool for wealth creation, growth and redistribution in the Majority World has been the focus of research in tourism studies since the 1970s with seminal work such as de Kadt (1979) and Lea (1988), the 1990s saw this as being integrated in the broader sustainability agenda with the most recent split of its rubric into two interconnected and controversial directions: development and climate change vs development and poverty alleviation, with the former being the result of the evolving environmentalist approach and the latter being defined by critics as neo-liberalism that fails to address the structural divide between the majority and the developed world (see Chok *et al.*, 2007; Scheyvens, 2007; Schilcher 2007).

The preceding section has presented an historical perspective aimed at reiterating the theoretical bedrock upon which to present the empirically based case studies that follow the first three chapters of reflection and scene setting. Our overall aim, then, is to communicate a series of ideas grounded in contemporary discussions (mainly) on the Majority World, development and tourism practices.

The first three chapters present a more general perspective – and critiques – on some key current issues such as: the UNWTO ST-EP (Sustainable Tourism – Eliminating Poverty) programme (Chapter 1 – Nawijn, Peeters, van der Sterren); sustainable rural development through tourism and NGOs practices (Chapter 2 –

Butcher); and the 'true key' to equality, growth and development beyond tourism statistics (Chapter 3 – Handszuh). The other chapters represent specific studies that are varied in nature, geographical location and methodological approaches, located mostly in the Majority World.

The eclectic collection provides both fresh insights and communicates new knowledge about the Majority World, development, and tourism. For instance, Friedl (Chapter 4) presents results from empirical research on the relations between the indigenous Tuareg of a little village in the Aïr Mountains in West Africa, and western tourists. His research casts new light on 'host-guest' relationships and raises questions about the application of western concepts of exoticism and exotic culture in studying economic and cultural dynamics between ethnotourism and indigenous culture. Tourists do represent the presence of an 'alien' culture. They bring their own cultural mobility to the visited country, are not aware of the cultural shock they cause or, according to Friedl, they are simply not bothered. On the other hand, tourists themselves can be subjected to value judgements, based not only on cultural reality of the visited country but also on stereotypes created by mass media. This especially pertains to poor countries where images of Europe and USA are based on TV serials, 'Dynasty'-style soap operas, which show wealthy, idyllic, but totally fictional worlds. Expectations from wealthy tourists are out of proportion to on-the-ground realities and cause a lot of bitterness (e.g. the visitor has money but doesn't want to share). It is not a mystery any more that susceptibility to tourism dysfunctions varies between different cultures, which are influenced by the level of social development, education, distribution of income from the tourism industry and many other factors. Religion plays a major role here, which is assessed in Chapter 5 (Dłużewska).

Chapter 6 (Simoni) presents results from empirical research conducted in Cuba on the informal encounters between tourists and locals and on the multiple ways in which the latter use nationality as a resource in their daily encounters with tourists. In several tourist destinations, policies are developed and implemented to regulate the encounters between tourists and members of the local population. Bypassing these regulations, some residents and visitors engage in 'informal encounters' that happen beyond the control of the tourism authorities. Residents who engage with tourists in this unofficial realm develop strategies and tactics in order to 'tame' foreigners, make sense of them, get their attention, and develop meaningful relationships. Given the rapid globalization of the world and increased access to little-known destinations, the importance of studying and understanding destination image from through cross-cultural perspectives is growing.

The dynamics of immigration, perceptions and stereotypes offer a platform for discussion on current issues in tourism. Perceptions are fundamental in tourist decisions and are crucial in the formation of destination image. The purpose of the qualitative study presented in Chapter 7 (Moufakkir) is to assess the perceptions that the potential Dutch tourists have of Morocco as a tourism destination and examine how these affect destination image and travel propensity.

Chapter 8 (Millán Vázquez de la Torre and Agudo Gutiérrez) focuses on the key question of how rural tourism encourages regional development in a climate

of significant socio-economic imbalance, and presents results from empirical research conducted in the province of Córdoba (Spain) that assessed the influence of advertising and the level of satisfaction by the consumers using an econometric model.

Cipollari (Chapter 9) offers results of research conducted in the village of Botiza (Romania) focusing on the observation of the 'moments of interactions between tourists and members of the local community' and evident contradictions stimulate the author's thoughts.

Following Chadefaud's notion of 'tourism space' and Picard's idea of 'touristification', Nogués Pedregal (Chapter 10) explores a theoretical and methodological tool to understand development practices in tourism contexts. The author refers to these practices as 'conversion of place through tourism space'. He proposes an approach 'from the inside for the inside', hence, implementing a new strategy that considers tourism not as the main developer factor, but as a distinctive context for an ethnologically-friendly development.

Chapter 11 (Fahmi) examines the impact of recent tourism-related official policy for rehabilitation of historical Cairo and for gentrification of surrounding inner city areas on the urban poor's right to the city and their resistance actions against eviction. To a certain extent, a similar context is investigated by Baker in Chapter 12, who assesses the growing trends of tourism in Kerala (India) and the risks associated with the ongoing government investment strategy into private-public partnership to develop the luxury end of the local tourism sector and the related 'tragedy of enclosure'. Also based on Kerala is Chapter 13 (Megarry), which examines the extent to which poverty alleviation and empowerment can be facilitated by the development of the Kudumbashree scheme, a state-initiated women's cooperative development project aimed at developing group solidarity, empowering women, improving their social status and encouraging them to fight against exploitation.

Women play a peculiar role in tourism. In general, it is more difficult for women to access the profits coming from tourism. This is often due to social expectations regarding gender, as well as social restrictions on women which exist in the countries themselves. In relation to this, Chapter 14 (Flacke-Neudorfer) concentrates on a sustainable tourism project with the Akha, an ethnic minority in northern Laos.

Chapter 15 (González-Guerrero) is based on an ongoing piece of research in the community of San Juan de las Huertas in Mexico. The chapter begins by briefly describing the historical background of ejidos – a type of collective land ownership system formed during the land reform process. It goes on to explore the particularities and implications of rural tourism initiatives through ejidos rather than through individuals or the state, questioning simple notions of rural tourism that do not appear to take account of the complexity of land tenure relations. The paper then moves on to raise questions about rural tourism and its value for rural people in the presence of governmental interventions that encourage the formation of tourism groups and private enterprises in rural areas, while most of the activities lie within ejido land.

A growing body of literature exists that provides powerful evidence that tourism can be used to create pro-poor growth and benefit the poor in areas

where there are limited resources for development. However, while tourism to remote parts of the less economically developed world has seen constant increased growth, evidence and data to suggest that this has benefited the poor is scant. Chapter 16 (Cole) is a case study based on a long-term (1989–2005) ethnographic study from Ngadha, Flores (Indonesia) and examines why increases in tourism have done so little to aid development in the region.

With worldwide receipts for international tourism reaching US$735 billion in 2006 and 842 million international arrivals for the same year (UNWTO, 2007), tourism has the power to make major beneficial changes to peoples' lives. This movement of people and money has meant that, for example, in 2006 sub-Saharan Africa received 26 million visitors generating some US$15.7 billion (UNWTO, 2007) with the UNWTO expert panel saying that 'prospects for Africa look very bullish … [with] … growing optimism as to future growth prospects, with increasing emphasis on skills development … and transformation … to help better contribute to poverty alleviation' (UNWTO, 2007:32). In this sense academics, too, have responsibilities in communicating the benefits of tourism as well as the paradoxes. Our intention is that the present volume makes such a contribution.

Endnote

[1] 'Majority World' is a term that usefully surpasses (a) historically obsolete and derogatory terms such as 'Third World', (b) geographically incorrect constructions such as 'North-South' or 'Global South', and (c) deterministic phrases like 'Less Developed.' The term 'Third World' is a direct reference to the idea that the majority of the world's population live, work, and die in poverty (United Nations. Department of Economic and Social Affairs/Population Division. 2005. *World Population Prospects: The 2004 Revision, Highlights*. United Nations, New York, p. vi. http://www.un.org/esa/population/publications/WPP2004/2004Highlights_ finalrevised.pdf.)

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1   The ST-EP Programme and Least Developed Countries: is Tourism the Best Alternative?

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Sustainable Tourism to Eliminate Poverty (ST-EP): a Potential Strategy for Destinations?

The UNWTO (World Tourism Organization) ST-EP programme encourages (social, economic and ecological) sustainable tourism with the aim of alleviating poverty by bringing development and jobs to people living on less than one dollar a day. The ST-EP framework has a link with the millennium development goals (MDG) and the UNWTO Global Code of Ethics. It targets the world's poorest countries, particularly in Africa and developing states in general (WTO, 2006a). On the one hand researchers have indicated that tourism will increase and diminish poverty in several countries. Africa, for example, is particularly mentioned in the ST-EP programme. A working paper (Christie and Crompton, 2001) foresees a vast increase in tourism in many African countries. On the other hand, research shows that Africa is not able to reduce poverty by half in 2015 and thus will not reach the MDG (Bigsten and Shimeles, 2007).

A renewed interest can be observed in the role that the tourism sector can play in alleviating poverty in least developed countries (LDCs). Governments of LDCs try to improve their perspectives for economic growth through maximizing the numbers of (mainly international) tourism arrivals and their expenditures. These revenues of hard currency income (through export of services) considerably raise national income and have positive employment effects. The following arguments seem to justify a renewed attention to tourism as a strategy for poverty alleviation.

Liberalization of markets appears to be a strong engine for economic growth. Tourism depends strongly on open markets. It may not be surprising that countries like Turkey, Mexico and China, the most advanced countries in achieving liberalization (Deutsche Bank, 2005), take top positions among developing countries when it comes to growth rates in international tourism arrivals and tourism expenditures.

At the same time, there is a continuous negative outlook for future macroeconomic growth for LDCs. Their structural balance of payments deficits, lack of competitive strength and alternatives of economic growth limit their opportunities to participate in liberalized global markets. As international tourism arrivals are registering higher growth rates than average gross domestic product (GDP) growth for most LDCs, it is not surprising that these countries, highly indebted, focus on this parameter and decide to invest increased resources in tourism.

The trend towards a continuous search for new tourism destinations, specialized and diversified tourism products, to satisfy consumer's increased needs for new holiday experiences, offers opportunities for new destinations. This trend leads to new patterns of dis- and re-intermediation within the tourism sector: traditional tour operators face competition from online and specialized intermediaries, competition takes place more and more at and between tourism destinations and less at consumer source markets (Dwyer, 2006).

Consumer awareness has increased. Tourists are willing to support and even pay more for sustainable tourism products. Though this has given rise to a diversified supply of niche and specialized tourism services, the tourism industry does not seem to be concerned by global environmental and social change issues so far (Gössling and Hall, 2006). Hardly any alternative large scale sustainable business models have been developed in the tourism sector. The most probable reason for this is that income is the biggest determining factor in the growth of international tourism demand (Algieri, 2006).

When considering the above it is not surprising that LDCs focus on the tourism sector as a possible engine for economic growth. Hereby they are using the number of international arrivals as an indicator of success.

Pro-poor Tourism and the ST-EP Approach

The UNWTO and several international donor and development organizations such as the Dutch SNV are strong promoters of tourism as a strategy for poverty alleviation. According to the UNWTO, the ST-EP programme serves as a 'primary tool for eliminating poverty in the world's poorest countries' (WTO, 2002: 15). UNWTO underpins these statements with claims like 'tourism is the primary source of foreign exchange earnings in the 49 least developed countries' and 'Tourism is a principal export for 83% of developing countries' (WTO, 2002). Only the export share of international tourism is supported by quantitative data (WTO, 2002; Denman and Denman, 2004).

Predictions of tourist arrivals are mostly based on UNWTO statistics like the tourism 2020 vision. In this vision the top three receiving regions in 2020 will be Europe (717 million tourists), East Asia and the Pacific (397 million) and the Americas (282 million), followed by Africa, the Middle East and South Asia. Europe would keep the highest share of world international arrivals. There is a decline from 60% in 1995 to 46% in 2020 (WTO, 2006b). Long-haul travel will grow faster, at 5.4% per year over the period 1995–2020, compared to intraregional travel, at 3.8%. The share of long-haul travel will increase from

18% in 1995 to 24% in 2020 (WTO, 2006b). The same data surprisingly show that the growth is particularly high for poor countries, for instance Africa, where most of the LDCs are located.

The argument that the poor in LDCs benefit through tourism is questioned by UNWTO itself (WTO, 2002), when declaring that it is a good way to fight poverty, under the condition that it is transformed into a kind of 'ideal tourism'. ST-EP seems to ignore the fact that the 'western tourist' does not exist and that there are substantial differences in tourism source markets and customer's preferences (van Egmond, 2006). This raises the question of whether tourism is always the best industry to decrease poverty for the poor in poor countries or, at least, what the disadvantages will be of non-ideal ordinary tourism development.

Why may sustainable tourism not be the best way for large-scale alleviation of poverty? The UNWTO ST-EP programme is, in its actual presentation, too optimistic on the potential of tourism for the LDCs. It is taking a micro level view, without looking at global structural realities, impacts and limitations of international tourism. We will analyse the promise of tourism for LDCs compared with some major macro aspects.

Structural political constraints: good governance, investment climate, and income redistribution

Globalization, trade liberalization and opening markets of poor countries tends to increase poverty and the disparity in income (Kohl and O'Rourke, 2000). Sustained economic growth of tourism destinations requires a stable economic and political investment climate. Most LDCs are unable to provide this. The persistence of low quality infrastructure, corruption, bad governance and a weak financial position are obstacles to foreign direct investments (FDI).

Not surprisingly, as it is, among other issues, a consequence of LDCs weak negotiating position in world trade markets and UNWTO negotiations, many LDCs opt for less open economic policies. They apply exchange rate controls and restrict transfers of foreign currencies, restrict establishment of foreign businesses and have visa requirements.

Especially in areas that are considered to be crucial for achieving higher GDP growth, such as services liberalization and clear and transparent trade rules, the poorest LDCs are performing less (IMF, 2006). These measures and policies prevent even more foreign investments from entering the LDCs (WTO, 2005) and this explains why LDCs have seen slow tourism development or in some cases even negative growth rates (WTO, 2005).

Though revenues from international tourism arrivals are becoming the primary source of export earnings in more and more developing countries, the overall share in international tourism of LDCs is still very small, accounting for less than 1% of international tourism receipts in 2003. This means that export volumes of LDCs are very low.

Some countries in Africa, like Kenya, Tanzania, Uganda, South Africa (mostly not belonging to the group of LDCs), with more liberalized financial and other service sectors, may have achieved higher growth rates and shares of

international arrivals. However, these governments have not been able to redistribute this growth. A strategy of equitable tourism development with effective redistribution of economic growth requires active participation of stakeholders involved. Unfortunately, the lack of good governance culture and practice in most LDCs leads to a situation where most governments use top-down policies in tourism to avoid higher income inequalities (Gössling, 2003).

Structural environmental constraints: scalability

In order for LDCs to collect foreign money from 'rich' western tourists, they have to travel to 'poor' countries, by means of air transport and over long distances. Aviation has relatively large greenhouse gas emissions per traveller's kilometre (Penner *et al.*, 1999; Schumann, 2003). Not only do the carbon dioxide emissions contribute to it, but other impacts – emissions of nitrogen oxides carbon-hydrates, water vapour and the forming of contrails – are at least as large as that of CO_2 alone (see also Sausen *et al.*, 2005). A simple calculation shows that a significant change in poverty leads to a large increase in the total human contribution to climate change (based on Peeters, 2003; Sterren *et al.*, 2005). The average tourist in a developing country spends approximately $550 per visit (WTO, 2002: 27). Poverty can be defined as an annual income of $730 (WTO, 2002: 19). To raise the income of 2.7 billion of the poorest people with $730 per year per head would require 18 billion western tourists and as many long-haul round trips, assuming 20% of the western tourists' spending benefits the poor. This would require about 220,000 billion passenger kilometres by air transport. Current aviation produces 3500 billion travellers' kilometres per year (Peeters, 2005). This growth would triple the total human emissions of greenhouse gases, responsible for climate change, of all economic sectors together, while a 50–80% reduction is required (Graßl *et al.*, 2003).

Ignoring the climate problem has serious consequences for poor countries (IPCC, 2001). That is why poverty reduction measures at the cost of climate change should be treated with great caution. Therefore, West-South tourism appears not to be a sustainable solution, as it has a low eco-efficiency (the amount of dollars earned per tonne emission of greenhouse gases). The eco-efficiency of average long-haul tourism is about ten times worse compared to the world economy average (Gössling *et al.*, 2005). Most other industries (light industry, ICT, non-tourist services and domestic or South-South tourism) are capable of a more eco-efficient contribution to poverty reduction. Even 'ideal' western tourism could only account for one or a few per cent reduction of the poverty problem, without detrimental impacts on the environment, specifically climate change.

Hamilton *et al.* (2005) expect a decrease of West-South tourism due to climate change. Western tourists will travel less far, or stay in their home country, resulting in a fall of total international tourist numbers (relative to the baseline without climate change). The opposite would occur in warmer countries. Hamilton *et al.* (2005) predict that future increases in mass tourism are concentrated close to the countries of origin. The impact of climate change on tourism will be one that benefits the temperate (often developed) regions at the cost of the current warmest

areas like most of Africa. It is therefore likely that tourism numbers to LDCs will decrease in a warming world. Related risks of political instability will mostly affect these areas: they are located in some of the most vulnerable areas in the world and have a low capacity to adapt to climate changes (Hulme *et al.*, 2001).

Structural economic constraints: competing in liberalized markets

Even with liberalized service markets, economic growth alone does not automatically guarantee a reduction in poverty. Governments and policy makers must invest in healthcare, nutrition, education (Rosegrant and Hazell, 2001), and free press and democratic institutions (Klasen, 2001). There are differences between countries in the share of economic growth benefiting poor people (Ravallion, 2001). With trade in tourism services being regulated within GATS (General Agreement on Trade in Services), only by lowering import restrictions and facilitating tax advantages, can international investments be attracted. These are highly necessary for improving infrastructure and quality of accommodation and services.

Governments opening their economies for increasing tourism income facilitate a good investment climate through tax exemptions on profit repatriation or value added tax. These measures have short-term positive effects through increased FDI. In the longer term, a major proportion of annual tourism revenues is being repatriated. Only an estimated 20–40% of tourism revenues remain in the national economy of developing countries (Gössling, 2003).

As already indicated, the increase in FDI is running behind in most African LDCs, slowing down growth of international arrivals, being only slightly higher than average GDP growth (IMF, 2006; WTO, 2006c).

If managed properly, international tourism may have a positive effect on overall domestic economic development. International tourism has a higher marginal productivity factor compared to other sectors. The productivity difference increases (in most cases) with the level of development, but diminishes as the importance of tourism increases in the economy (Skerritt and Huybers, 2005).

Unfortunately, the first and foremost business goal of international tourism companies investing in new tourism destinations (hotel chains, real estate companies and tour operators) is not to reduce poverty but to achieve an acceptable level of financial returns at the lowest possible risks. Some smaller specialized international tourism companies may have a different approach, but they offer services to small markets and usually exist by selling 'mainstream' mass tourism (Kontogeorgopoulus, 2005: 9). The competition between international tour operators is focused on low consumer prices. One may question whether all-inclusive trips from Amsterdam to Kenya or Cuba for less than 500 euros, after deduction of travel expenses and profits for the western companies involved, leaves any money for local inhabitants at all.

Tourism destinations in LDCs are forced to compete against each other, and extremely low prices for products and services are the only instrument to compensate for the relatively high proportion of travel costs in long-haul flights. With tourism services falling within the framework of GATS, protection of a

domestic service industry is impossible and domestic tour operators in LDCs compete with powerful international tour operators from industrial countries. They do so, while lacking access to information sources, communication services and relatively cheap international sources of finance. It seems a rather unequal battle.

Specialization in tourism appears to make sense only if countries are small, remote, well endowed with high quality natural and/or cultural attractions and if substitution for labour and technology to other sectors is difficult to achieve (Algieri, 2006). Even so, external factors like the cost of living and international airfares are highly significant factors in determining the effective positive economic impact of tourism revenues for destinations. Also, though tourism specialization might lead to higher national economic growth, little evidence has been found that it contributes to a better distribution of income within LDCs.

At the local level, small scale initiatives have been capable of increasing income for poor communities, especially when related to natural resource management. But this provides a supplementary source of income (DFID, 2003). Other successful poverty alleviation projects like the Tanzania Cultural Tourism Project have received continued international donor support for many (in this case 10) years. Though, under favourable circumstances (mainly achieved through external donor support), tourism is capable of contributing to alleviation of poverty, there is no business model that can easily be replicated in other market environments and without external financial resources. Again, scalability to the world scene is problematic here.

Structural cultural constraints: cultural effects

In general, western tourists enjoy relaxing, warm climates, beautiful surroundings, visiting new places and good food during their holiday (Ryan, 2002). Preserving local culture is not specifically on that list. On the contrary, bad food, uncomfortable accommodation, 'pushy' locals, and a lack of hygiene ruin many a holiday. All of these can be found relatively frequently in LDCs (Duffy, 2002). Most tourists do not undertake anything to preserve local culture. Local traditions such as the separation of men and women during traditional ceremonies and non-western food (Cole, 2004) and – according to many tourists – unethical traditions like hunting, can also negatively influence their holiday experience (Butler and Hinch, 1996). Adjustments thus mainly have to originate from the locals. Tourists have many destinations to choose from, the local has the choice between attracting tourists or not. This means that a country or region which wants to attract western tourists, needs to adapt part of its own culture to the western culture. Consequences are often negative (Craik, 1995; Amelung, 2006). It is not very likely that other sectors of the economy have the same influence on local culture and traditions.

What Could Help the Poor?

As a preliminary conclusion it seems legitimate to state that UNWTO should not create too high expectations when promoting, through its ST-EP programme,

tourism as a sustainable strategy to eliminate poverty in LDCs.

International migration (an increase in the share of a country's population that is living abroad) leads to a decline of the poor in developing countries. International migration and the financial remittances have a strong statistical impact on reducing poverty. According to Adams, a 10% increase in the share of international migrants of a LDC in a foreign country leads to a 1.9% decline in the share of poor people in the LDC (Adams and Page, 2003).

Another sector which is present in rural areas of most developing countries, agriculture, appears to be a more suitable industry for alleviating poverty. Research shows that high rates of agricultural growth reduce poverty greatly (Mellor, 1999). Sustainable agriculture might minimize the damage done to the environment or farmers' and consumers' health (Pretty and Hine, 2001). Sustainable agriculture could be a sustainable solution for helping the poor overcome poverty (Cattarinich, 2001). Still, additional research in livelihood income is required. Improved market access for agricultural products from LDCs to western sales markets might well be more effective than stimulating free movements of people and services.

Most probably, attracting FDI for tourism purposes brings the highest short-term macroeconomic benefits to LDCs. When considering a longer time frame, however, investments in tourism (e.g. real estate) should be compared with alternative productive land uses like agroindustry, or with other services like information and communications technology (ICT) or the financial sector. For some LDCs, more employment, a better income distribution and less negative environmental impacts might be achieved through a development strategy supporting non-tourism sectors. Without knowing, these alternative strategies should at least be compared by governments in LDCs, before taking any decisions on tax exemptions and fiscal measures to boost hard currency income from tourism.

Discussion and Conclusions

There are several cultural and environmental constraints attached to West-South tourism. Having taken a closer look at the ST-EP programme we conclude that it could better be renamed T-AP (Tourism to Alleviate Poverty) as its current approach lacks environmental sustainability. On the other hand, we see some evidence that tourism may reduce poverty, but in many cases at the severe cost of increased environmental problems, with climate change being the most important example. The economic benefits remain generally unproven in the literature.

When aiming to use tourism as a strategy for reducing poverty one should not focus on indicators of poverty reduction at the destination level only. It seems so far unproven that growth of international tourism arrivals would contribute to a better income distribution in LDCs, without taking into account the above mentioned and mostly negative impacts this kind of tourism still has. Unfortunately, the dominant actors in the tourism industry are still caught in the same logic, obliged to appeal to the consumer's feeling of increased global mobility 'at the lowest price' without charging the real (environmental and social)

costs. Without government intervention it seems unlikely that the dominant actors will change. Perhaps it is impossible to combine sustainable tourism in its true meaning, in compliance with all three sustainability requirements (environment, social equity and economy) with significant poverty alleviation.

If UNWTO really wants tourism to alleviate poverty and be sustainable at the same time, UNWTO should persuade governments in tourism destinations to direct their tourism product and promotion and marketing efforts at short- and medium-haul markets like neighbouring countries (this positively influences the balance of payments) and domestic tourism markets (helping to redistribute wealth to poor people). In other words: sustainable tourism to alleviate poverty will have to be found mainly in South-South tourism. This significantly raises the eco-efficiency, by avoiding long-haul West-South travel. In ASEAN (Association of South-East Asian Nations) countries, regional tourist arrivals account for 36%, in SADC (Southern African Development Community) 59% and in Mercosur (Argentina, Brazil, Paraguay, Uruguay and Chile as associate members) regional tourists account for 69% of the total arrivals (Ghimire, 2001). Peru receives 90% of trips and half of its tourist revenues from domestic tourism (PromPerú, 2004a,b).

Also, most other industries should be able to acquire a better eco-efficiency than the tourism industry. One might, of course, charge long-haul travel and use this income for poverty alleviation, focusing on all economic sectors where the poor are active, as well as for better education and health systems and for access to financial services (microfinance). It is our hypothesis that this way of support might be much more effective than contributing to small-scale projects requiring long-term intensified support and lacking the option of large scale application.

Like others (Buhalis, 1999) we emphasize that elaborate multidisciplinary research is required to assess the impacts of tourism and to determine whether tourism is a determinant of economic growth (Bigsten and Shimeles, 2007) and poverty alleviation. We recommend the development of integrated dynamic models for the role of different tourism markets (local, domestic, intra-regional and inter-regional) with destinations in developing countries on alleviating poverty, without compromising the environment or the international goals for alleviating climate change.

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2

The Myth of Agency through Community Participation in Ecotourism

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Introduction

The term 'agency' is used widely in sociology with slightly different emphases. Most commonly, and here, it is utilized with regard to the 'structure-agency' issue that is prominent in social and political theory; 'structure' emphasizing the determining contextual features of a society, features that shape or constrain human action, and 'agency' emphasizing undetermined human action (Giddens, 1991; Marshall, 1998).

Agency through community participation is consistently implied by neo-populist advocates of ecotourism. 'Community participation' suggests a greater level of control by and democracy for people – it has the potential to 'empower' people to take control over their destiny. Hence community participation has become established as an orthodoxy in the literature on rural development through ecotourism. According to one account, 'since the 1970s in many ways, community participation has become an umbrella term for a supposedly new genre of development intervention… [T]o propose a development strategy that is not participatory is now almost reactionary' (Tosun, 2000: 165).

It is perhaps precisely because of this latter sentiment that substantial critical studies tend to focus on the problem of *operationalizing* the concept, rather than on the concept itself (e.g. Reed, 1997; Tosun, 2000). For this reason it is worth looking more critically at the often grand claims made for community participation in ecotourism by the NGOs pioneering it as a tool for integrating conservation and development and the numerous supportive academics.

This chapter establishes the centrality of community participation in the advocacy of tourism integrated conservation and development projects (ICDPs) (essentially ecotourism projects that explicitly aim to bring limited development opportunities on the basis of conservation) as sustainable development in the developing world, and provides an analysis of the claims made. It will be argued that community participation is presented as a principle, and is associated with a

progressive, democratic impulse. However, it is further argued that community participation may be driven by other goals, principally that of conservation, and that it can be in an important sense *instrumental* to these other goals.

Also, it will be argued that the community's participation may be more of a pragmatic choice than an extension of democracy, as their involvement is limited to project implementation only. The idea of community participation as *instrumental*, and its acceptance by communities as *pragmatic*, will be counter-posed to the grand claims that it can lead to a 'people centred' development in which the agency of the community is central. To accept the rhetoric of community participation uncritically is to accept a diminished view of human agency and politics, one that does not deserve the radical credentials often accompanying this rhetoric.

The Centrality of Participation

Strands of thinking on development and conservation respectively have tended to converge around the community participation agenda (Adams, 2001). This is clear when we consider the rise of sustainable development in contemporary society. Whilst remaining elusive in practice, sustainable development encapsulates the aspiration not only to combine conservation and development, but to engage communities and societies in this project. For example, the influential *Caring for the Earth: a Strategy for Sustainability* (IUCN, 1991) lists one of its nine principles for sustainable development as to 'enable communities to care for *their own* environments' (my italics). Notably, the UN Conference on Environment and Development – the event that proved to be a watershed in establishing sustainable development as a rhetorical orthodoxy – put great emphasis on community participation (UN, 1993), and was itself a striking example of the perceived need to involve communities and various stakeholders [many NGOs, large and small, were invited to the Summit, although it has been argued that their actual participation was quite limited (Mowforth and Munt, 1998; Adams, 2001)].

More specifically, community participation is fundamental to neopopulist views on development, views that are very influential in the advocacy of sustainable development (Chambers, 1997; Potter *et al.*, 1999), and that characterize the advocacy of tourism ICDPs. A typical neopopulist definition of community participation is that it should be about 'empowering people to mobilise their own capacities, to be social actors, rather than passive subjects, [to] manage the resources, make the decisions, and control the activities that affect their lives' (Cernea, 1985, cited in Barnett, 1995: 3). The definition emphasizes control by the community – it is clearly *their* agency that is at the forefront of this formulation of development, not that of foreign governmental, commercial or non-governmental agencies.

Neopopulist writers such as Friedman (1992) argue along similar lines that development in the context of developing world states should embrace self-sufficiency, self-determination and empowerment, as well as improving people's living standards. The term empowerment in particular is ubiquitous in the discourse and, for France, applies to, 'individuals, households, local groups, communities, regions and nations' enabling them to 'shape their own lives and the

kind of society in which they live' (France, 1997: 149). Notably, empowerment is almost always applied to local communities or individuals. ICDPs, too, are almost by definition based around local communities.

In the 1980s, publications such as Murphy's *Tourism: A Community Approach* (1985), and Krippendorf's *The Holidaymakers: Understanding the Impact of Leisure and Travel* (1987) established community participation as orthodoxy in the literature on tourism and development, mirroring the wider development literature (Cooke and Kothari, 2001). All prominent authors concur, to the extent that Mowforth and Munt can rightly assert that '[t]he debate is currently not one of whether local communities should be involved in the development of tourism to their areas, but how they should be involved and whether 'involvement' means 'control'' (Mowforth and Munt, 1998: 103–4).

Moreover, community participation is considered as vital for achieving *sustainable* development in general (Porritt and Warburton, 1998) and specifically with regard to tourism (Scheyvens, 2002). Indeed, in a thorough review of literature on community participation in tourism, Tosun even argues that 'a community approach to tourism development is a *prerequisite* to sustainability' (my italics) (Tosun, 2000: 617). The logic behind this is that it is the communities living in and around conservation areas that are best placed to manage the environment in a sustainable fashion.

As is the fashion in these debates, small scale 'participatory' projects are often favourably compared to the experience of mass tourism in establishing sustainable development. Mass tourism, as an exemplar of modern, mass society, is often considered to have been too grand and impersonal to reflect diverse cultures and views, especially of villages in rural areas. According to Brohman, for example, 'developing countries may avoid many of the problems that have plagued past tourism […] by involving diverse social groups from the popular sectors of local communities in decision making' (Brohman, 1996: 568). Here, Brohman presents local and small scale initiatives as a partial antidote to national development schemas on a grander scale. Indeed, ecotourism has acquired a certain moral authority *vis-à-vis* mass tourism in debates on sustainable development on this basis (Butcher, 2003).

Whilst there may in practice be a gulf between the ideas expressed in the literature and the reality of tourism planning, those directly involved in planning have bought heavily into the ethos of community participation too. WTO tourism planner Inskeep, for example, has advocated community participation as essential to tourism planning (Inskeep, 1991: 29). International agencies as diverse as the World Tourism Organization (WTO), the World Travel and Tourism Council (WTTC), World Bank, the United Nations (UN), national development agencies and NGOs, have all adopted community participation as their own in general, or with regard to tourism in the developing world in particular.

Community participation, then, is widely supported and advocated with regard to tourism in the developing world (see also Boo, 1990; Theopile, 1995; Hawkins and Khan, 1998; Scheyvens, 1999; Fennell, 2003). Having originated as an alternative narrative, against the mainstream, there is little doubt that, rhetorically at least, it has acquired the status of an normative orthodoxy. Community participation in tourism ICDPs can, it is held, increase the extent to

which local communities have 'control'. It can 'empower' them, make them more 'self-sufficient', or give them 'ownership' over a project. These neopopulist sentiments are commonplace in the advocacy of tourism ICDPs. Moreover, community participation carries an association with sustainable development and, hence, also a legitimacy and authority in development discourse.

The corollary of the neopopulist emphasis on development conceived of at a *local* level, rather than a *national* level, at least in the first instance, is that the community is invariably taken to be a *local* community. Central to this neopopulist view is what Sachs has called 'participatory planning and grass roots activation' (Sachs, 1979: 113). For Glaeser and Vyasulu, (1984: 26), participatory development should mean that 'people who are affected by changes which they have decided are desirable cooperate voluntarily in the process of implementing the changes by giving them direction and momentum'. The authors here are referring to 'ecodevelopment', small scale developments that encourage sustainable development on a local, rural and small scale basis (Glaeser and Vyasulu, 1984), although this is readily associated with sustainable development among ecotourism's advocates. Formulations such as these consistently privilege the local over the national in development, and this is mirrored and magnified in the literature specifically about ecotourism. Brohman puts this case clearly:

> Community based tourism development would seek to strengthen institutions designed to enhance local participation and promote the economic, social and cultural well-being of the popular majority. It would also seek to strike a balanced and harmonious approach to development that would stress considerations such as the compatibility of various forms of tourism with other components of the local economy; the quality of development, both culturally and environmentally; and the divergent needs, interests, and potentials of the community and its inhabitants.

> (Brohman, 1996: 60)

It is *local* participation that is to be enhanced, and the *local* economy, rather than the national economy, with which tourism is to be compatible in this formulation.

In a similar vein Scheyvens says of her book, *Tourism for Development: Empowering Communities* (2002), that '[i]t is not a book about how governments can extract the greatest economic benefits from encouraging foreign investment in tourism. […] Rather, the interests of *local communities* in tourism development are placed at the forefront' (my italics) (Scheyvens, 2002: 8). Hence she makes explicit that the locality is the most appropriate spatial and political unit for development in terms of human well-being. She suggests that distant governments benefit from the more traditional approach to development, while tourism ICDPs can be oriented towards local people in their communities, and are hence 'good change' (Chambers, 1983). This is a popular, and populist, approach, and is evident in a great many studies on the impact of tourism on communities.

So there is a strong sense in the literature on ecotourism and development, mirroring the more general neopopulist literature, that local community level development is the most appropriate way to address development, and that this might yield a more 'sustainable' development. This is typically presented as progressive compared to the grand schemas of states, schemas typically proposing modernization and transformation beyond the local, at the national level.

The conservation and well-being oriented NGOs who have pioneered tourism ICDPs over the last 15–20 years share the same emphasis. For example, in the case of World Wide Fund for Nature (WWF), imparting a high degree of control to the local community is a central feature of their advocacy of tourism ICDPs. Their emphasis on community is summed up in a position statement thus:

> Local communities reserve the right to maintain and control their cultural heritage and to manage the positive and negative impacts that tourism brings. Tourism should therefore respect the rights and wishes of local people and provide opportunities for the community to participate actively in decision making and consultations on tourism planning and management issues. Local traditions should be taken into account in buildings, and architectural development should be in harmony with the environment and the landscape. The knowledge and experience of local communities in sustainable resource management can make a major contribution to responsible tourism. Tourism should therefore respect and value local knowledge and experience, maximise benefits to communities, and recruit, train, and employ local people at all levels.

> (WWF-International, 2001: 3)

Here, WWF go beyond the general rhetoric of community participation, and identify the valuing of local knowledge and experience, development 'in harmony with the environment', the community's ability to 'control' their cultural heritage and the provision of economic opportunities for local people 'at all levels' as key goals (WWF-International, 2001).

They also link community participation to 'sustainable resource management' and to 'responsible tourism' development (WWF-International, 2001). As such, it is cited as the appropriate level for development, or to be precise, for the combined goals of conservation and development, to take place.

For Dutch development agency and pioneers of tourism ICDPs, SNV, the participation of local people is 'an important principle in developing a sense of ownership of the project' (SNV/Caalders and Cottrell, 2001: 32). They claim to place a strong emphasis on social mobilization and local governance linked to community development (SNV/Caalders and Cottrell, 2001). Indeed, participation by the local community is viewed as a *prerequisite* for projects if they are to meet the aims of SNV. Participation 'should be incorporated into the very beginning of a programme to maintain responsibility, interest and ownership of the development activities within the local actors' (SNV/Caalders and Cottrell, 2001: 6).

SNV's emphasis is clearly on the neopopulist aim of generating development that is endogenous, from within the community, rather than exogenous. For example, in Botswana, SNV regard 'community based tourism not as an end in itself but as a means towards empowering poor communities to take control over their land and resources, to tap their potential, and to acquire the skills necessary for their own development' (SNV/Rozenmeijer, 2001: 7). This document, discussing SNV's experience in Botswana, goes so far as to assert that, through tourism ICDPs, people 'have the potential to control their own development process' (SNV/Rozenmeijer, 2001: 55). Here, the emphasis is put on the community – *their* potential, *their* development. SNV's role is presented as being to empower communities towards this end.

Influential UK-based campaigning NGO Tourism Concern often cite a lack of genuine community participation in projects. For example, in the editorial of the summer 1995 edition of their magazine *In Focus*, titled 'Local Participation – Dream or Reality', they argue that 'local communication has become a "buzz word" in the development field' (Barnett, 1995: 3). The editorial is critical of the breadth of the rhetoric of community participation, alongside the reality of so few good examples. Barnett problematizes the issue, arguing that 'tourism must recognize the rights of residents to be involved in its development and management. Without this […] tourism cannot be equitable and have a long term sustainable future' (ibid.).

Probably the most important codification of ecotourism 'best practice', the United Nations International Year of Ecotourism (IYE), prominently features the importance of community participation. This event featured many prominent NGOs, and was held under the auspices of the United Nations Environment Program (UNEP) and WTO. For example, the *Quebec Declaration*, a summary of the main recommendations from the IYE, refers to 'the right to *self determination* and *cultural sovereignty* of indigenous and local communities' with community participation the means to this laudable end (UNEP/WTO, 2002: 66) (my italics).

So the NGOs at the cutting edge of developing tourism ICDPs place participation at the centre of their advocacy, associating it with the ability of the community to take control over their own development, and hence with the promotion of the agency of the community. On the face of it, this emphasis on factoring the community and their culture into tourism development seems admirable and democratic.

NGOs as Facilitators

The corollary of the talking up of community agency through the language of community participation is that the NGOs are presented as *facilitators* – they bring to bear expertise and advice, and bring together the relevant stakeholders, but essentially are facilitating a process in which the community take the lead.

This is perhaps best illustrated by the stated aims of the NGOs at the cutting edge. For example, WWF tourism expert Justin Woolford has emphasized the importance of community participation to his organization thus:

> It is quite difficult to separate ecotourism and community based tourism as far as we are concerned and as far as our projects are concerned. We'd subscribe to The International Ecotourism Society view about travel to natural places that is beneficial to people and to the environment […]. We'd subscribe to that but maybe go a little bit further and say *we'd like it to be determined by local people*, rather than it just being beneficial for them.
>
> (Woolford, 2002)

That the community, not outside agencies or the WWF themselves, 'determine[d]' outcomes is a consistent feature of the advocacy of community participation. Implicit in the above quotation is the role of WWF as *facilitators* of participation, a process that they rationalize as enabling developing world peoples to 'preserve

their natural resources' (my italics) (Woolford, 2002). The rationale here is that the natural environment and culture are *of the community*, and the role of WWF is to facilitate the community in benefiting from these resources, while also conserving them.

Elsewhere, Gaynor Whyles, WWF's European Policy Officer, referring to projects on Albania's Mediterranean coast, asserts that '[t]he Albanians are in the driving seat of [the] project. Through a process of participatory development – probably the most important part of this project, *they* will use the skills of our project team to realise *their expectations*' (cited in Farrow, 1995: 9) (my italics).

Further, Cherry Farrow, Communications Officer for WWF, argues that

> WWF has long experience in developing integrated conservation and development projects that aim *to assist rural communities to manage their natural resources wisely*, promote rural development and solve environmental problems through the use of both formal and community education.
>
> (Farrow, 1995: 9–10) (my italics)

Another prominent example of this rationale is the Campfire programme in Zimbabwe, a longstanding and often discussed tourism ICDP in which WWF are centrally involved. WWF argue that

> [f]rom the very beginning, *the indigenous people of these communal areas became the driving force behind the Campfire Programme*. The Tonga, Venda, Ndau, Ndebele and Shangaan people of Zimbabwe became responsible for managing their own natural resources and were able to retain significant benefits at the village and ward levels.
>
> (WWF-UK, undated) (my italics)

Clearly, WWF's role in these examples is presented as primarily that of facilitation of community agency, with the community in 'the driving seat', acting as the 'driving force' in 'their' projects.

Further in this vein, there is a strong focus on facilitation to promote 'self help' in SNV's literature on tourism ICDPs (SNV/Caalders and Cottrell, 2001: 20). Their aim is to 'help people better understand the opportunities *they* have to improve *their own* situation' (SNV/Caalders and Cottrell, 2001) (my italics). As such, SNV present themselves as facilitators of the agency of the community. SNV, as the other NGOs, present themselves as agenda-less, rather than protagonists in the ideological issue of what constitutes 'good' development.

The role of facilitator is elaborated upon by SNV thus:

> To facilitate the development of a truly representative community organization that can deal with the different interests in resources use, and can ensure an equitable distribution of benefits, requires the involvement of an outside agency (NGO, government department, consultant).
>
> (SNV/Rozenmeijer, 2001: 57)

This is based on a clear understanding that communities can exhibit divisions based on class, gender, age and power (SNV/Rozenmeijer, 2001). Further, the NGO 'plays the role of a broker at different levels and links the community with the other stakeholders' (SNV/Rozenmeijer, 2001: 61). Notably, they add that '[a]s long as "community structures" have to manage "community resources"

some form of light touch facilitation may be required on a permanent basis' (SNV/Rozenmeijer, 2001: 61).

One academic author even goes so far as to describe community participation via ICDPs in terms of the devolution of 'political control' to the local level (Brohman, 1996). Yet the term 'political control' is surely misleading. Control in the case of tourism ICDPs is linked to funding, and the funding is invariably tied to the outlook or the interest of the donor. Funding comes with strings, and for rural societies in the developing world these strings may be strict limits on development arising from the perceived importance of biodiversity. Ultimately, the sites where tourism ICDPs will be funded by organizations such as WWF and Conservation International (CI) are determined by environmental considerations rather than human ones (in the case of these two organizations, 'ecoregions' and 'biodiversity hotspots' are the focus of and reason for their interventions). This is, of course, unsurprising – these are, after all, organizations founded and developed on the basis of environmental conservation. The emphasis on community participation, however, presents the mission of these organizations as one of a relatively disinterested facilitator of the wishes of others, which is far from the case.

In the case of development/well-being NGOs such as SNV this is rather less clear. SNV, as principally a development organization, potentially have a more open-ended agenda with regard to the shape of rural development. However, SNV's assistance emphasizes working around the pre-existing relationship between the community and surrounding natural environment rather than envisaging a transformation of this relationship (SNV/Caalders and Cottrell, 2001; SNV/Rozenmeijer, 2001). This is presented as a virtue, and is associated with sustainable development (SNV/Caalders and Cottrell, 2001). Sustainable development on the basis of the non-use of natural capital, as opposed to through its transformation (Tacconi, 2000), is likely to yield similar results to those of the conservation organizations in practice – if a community is dependent on its immediate natural resources, then to conserve these resources may well, given such meagre development opportunities, provide limited benefits for the community. And as SNV's support is offered on this basis, rather than on an alternative, more open-ended one, offering the possibility of wider economic transformation, wider development is not an option.

It is the case that some projects have emerged from requests from the communities themselves, and hence the NGOs' claim to be facilitators may carry more weight here. In interviews conducted, SNV, CI and Tourism Concern all cited examples where involvement had been in response to requests either from communities directly, or from governmental authorities (Barnett, 2000; Leijzer, 2002; Sweeting, 2002). However, even here the options for communities – the basis of their requests in the first place – are very constrained. The requests are likely to be a pragmatic response to the general dearth of development, an aid environment influenced by the 'greening of aid' (Adams, 2001) and a recognition that ecotourism is an expanding sector. They do not amount to an endorsement of ICDPs as a development strategy.

Even if community involvement is as thorough as one could possibly imagine, this is only 'control' in a limited sense of the word. 'Political control'

(Brohman, 1996), and a considerable amount of the rhetoric of the NGOs and academic advocates, implies that the *aims* of the funding, the trajectory of the development itself, is decided by the local population, and this is certainly not the case.

The Limits of Empowerment

As with 'facilitation' of the community, 'empowerment' has become ubiquitous as a justification for community participation. Empowerment is normally taken to refer to the increased ability of individuals or communities to influence their destiny. It hence has strong neopopulist connotations relating to the promotion of agency.

Scheyvens identifies four related aspects of empowerment that she believes should be features of tourism ICDPs (Scheyvens, 1999: 247–9; see also Scheyvens, 2002). These are listed below with brief definitions:

- Economic empowerment: lasting economic gains that are spread within the community.
- Psychological empowerment: relates to the self-esteem of members of the community, enhanced due to, for example, outside recognition of the 'uniqueness and value of their culture' and their 'traditional knowledge' (Scheyvens, 1999: 247).
- Social empowerment: social empowerment is held to have been achieved when '[e]cotourism maintains or enhances the local community's equilibrium' (Scheyvens, 1999) and when '[c]ommunity cohesion is improved' (Scheyvens, 1999) through the project.
- Political empowerment: 'The community's political structure, which fairly represents the needs and interests of all community groups, provides a forum through which people can raise questions relating to the ecotourism venture and have their concerns dealt with. Agencies initiating or implementing the ecotourism venture seek out the opinions of community groups (including special interest groups of women, youths and other socially disadvantaged groups) and provide opportunities for them to be represented on decision making bodies' (Scheyvens, 1999).

What is notable about this categorization is its limiting of the issue of power to the level of the community. All four of the categories, in so far as they might be regarded as political, or to do with the contestation of power, are micro-political categories – they pertain to politics *within* the community, in which the protagonists are individuals and interest groups. Even the widest category, that of 'political empowerment' (Scheyvens' definition of which is reproduced in full above) conceives of politics exclusively as internal to the community.

Elsewhere, Scheyvens also usefully provides critical comment on 'community' – the people to be empowered – that brings into the discussion different social networks and divisions within communities between rich and poor (Scheyvens, 2002: 16). Ultimately, however, the conception of power is restricted to the internal dynamics of the community themselves.

Scheyvens' definitions frame the outlook of the NGOs involved in ICDPs. Yet in reality the parameters of empowerment are substantially given prior to the process itself. For example, according to Akama, 'the local community need to be empowered to decide what forms of tourism facilities and wildlife conservation programmes they want to be developed in their respective communities, and how the tourism cost and benefits are to be shared among different stakeholders' (Akama, 1996: 573). However, that a mix of small-scale tourism and conservation is what is to be funded is beyond participation – it is established prior to the project itself, and, in the sort of projects Akama is referring to, funding will be conditional upon its acceptance. Akama criticizes 'western' environmental values, and argues that the community should be 'empowered' to overcome western bias (Akama, 1996). But the empowerment invoked by Akama is largely illusory, its limits determined by a prior conception of what is desirable development.

In locating the issue of power *within* the community, empowerment eschews what might be regarded as a *social* understanding of power. A social understanding would inevitably consider the *external* relationship of the community to the world market, to western aid agencies and to NGOs themselves. None of these seem to be features of empowerment as constituted by Scheyvens (2002). Indeed, her category 'psychological empowerment' is notable, too, in that it locates power at the level of an individual's psyche, which could be regarded as the antithesis of a social understanding. Broader issues of power between nations, between the developed and developing world, between social classes, and notions of social power beyond the immediate experience of individuals, are either deprioritized, or non-existent in this and other accounts that focus on empowerment. Reed (1997), for example, looks directly at the issue of power in her article entitled 'Power relations and community based tourism planning', yet the conception of power adopted is restricted to interpersonal and intergroup power within the community. This is hardly surprising, perhaps, given her definition of power as 'the ability to impose one's will or advance one's own interest' (Reed, 1997). Such a subjective and general conception of power easily conflates social power with intergroup relationships, and in this case substitutes the latter for the former.

Elsewhere, research has been conducted and critical accounts written, about how well various projects fare when their performance on participation is measured. Probably the most commonly invoked example of a scale for gauging this is Pretty's typology (Pretty, 1995; see also Scheyvens, 2002: 55). This typology can be read as a gauge of the thoroughness of empowerment as set out by Scheyvens, referred to above. Pretty's seven levels of participation feature 'manipulation' at one end and 'self mobilisation' at the other. Pretty's analysis presents a greater level of participation as 'good', with the ideal being this 'self mobilisation'. Here, communities instigate, as well as plan and see through, conservation and development projects within their community.

Yet Pretty's typology, too, emphasizes the question of the *distribution of power within a community*. Its focus is on interpersonal and intergroup power. It has nothing to say about the prior limits placed on the community from without. If living a subsistence existence, closely reliant on the immediate natural environment, is considered a limitation on the community's ability to develop economically, then such limits are not challenged by tourism ICDPs. These projects tie development

possibilities to the conservation of the immediate natural environment. Through the language of 'empowerment', 'participation' and 'control', such limits are presented as reflecting the agency of the community – *their* culture and *their* aspirations. The key issue arising here is whether the lauding of empowerment on a micro-political level rationalizes, or makes acceptable, a lack of power, or unequal power relations between the developed and developing worlds. If so, empowerment and community participation, as central aspects of the advocacy of tourism ICDPs, may be less than progressive.

As Mowforth and Munt point out, 'the push for local participation comes from a position of power, the first world' (Mowforth and Munt, 1998: 242). Yet the community participation agenda that has become the focus of many people's aspirations to 'empower' developing world communities eschews these power relations between the developed and developing worlds in favour of the micro-politics of the community. The extent to which power, control and democracy and other related ideas invoked in the advocacy of tourism ICDPs can be understood in this limited arena is questionable.

Community Participation: Democracy or Pragmatism?

Community participation suggests itself as part of a democratic agenda – greater choice, empowerment and control all evoke a greater degree of democracy in development. The neopopulist tradition underpinning tourism ICDPs has at its heart a promotion of the agency of the popular majority, usually within a locality. Tosun even asserts, with reference to tourism development, that without community participation, 'democracy and individual liberty may not be sustainable' (Tosun, 2000: 615).

Yet what happens when communities opt for alternatives – mass tourism perhaps – that are not in keeping with the aims of funding authorities such as NGOs or western development agencies? Weaver articulates this dilemma as follows:

> If [these] experts attempt to impose an AT (alternative tourism) model or to re-educate the local people so that they change their preferences, the entire issue of local decision making, control and community based tourism is called into question.

> (Weaver, 1998: 15)

However, this situation may rarely surface as, while communities may have many opportunities to engage with how a project is implemented, and how its benefits are distributed, the broader issue of choosing development priorities is foreclosed – there simply is not a mechanism through which communities can play a part in this. Where they do have an alternative – as in the case of the Inuit communities in the Arctic – they may well choose priorities deemed to be 'unsustainable' by some (in this case oil extraction over conservation and small scale ecotourism. See Lister, 2001a; 2001b).

Are communities 'seduced by western NGOs into accepting their projects on their terms' (John Tinker, President of the Panos Institute, cited in Scheyvens, 2002: 231)? In reality, it may be less a case of seduction, and more one of

pragmatism. Faced with the possibility of assistance tied to a particular type of project, or no assistance at all, the pragmatic choice is to accept assistance regardless of any unfavourable terms attached.

Jaime Joseph is correct to argue that the localism of NGOs reflects a 'limited – often negative – concept of what politics is about' (Joseph, 2001: 152). It is only through democratic political activity that people can have some control over bigger political issues such as the trajectory of development itself (Joseph, 2001). Localism situates control at the local level, and assumes that the big question of the type of development has been resolved beyond debate in favour of sustainable development which in this case is interpreted as being rooted in the pre-existing relationship between people and their local environment. Certainly, in the advocacy of ecotourism, the state and national development is often ignored or denigrated. Agency is talked up at the local level, but at the same time limited to that level. Hence the possibility to act beyond the immediate issue of managing local resources is ruled out of court in this discourse – it rarely features in analyses. The democratic credentials of tourism ICDPs are, then, at best illusory and at worst denigrate democracy by limiting it to the local level.

Critics of Community Participation

Much literature on community participation does have a critical edge. For example, Midgeley writes with insight that 'the notion of community participation is deeply ideological in that it reflects beliefs derived from social and political theories about how societies should be organized' (Midgeley, 1986: 4). Midgeley is referring here to the notion that the rhetoric of community participation could be a cover for western style 'modernisation', an argument also prominent in Mowforth and Munt's *Tourism and Sustainability: New Tourism in the Third World* (1998).

In fact, as noted earlier, many critics have questioned the efficacy of community participation along these lines, regarding it as either tokenistic, or a cover for commercial or preservationist schemes. For example, Woodwood's research argued that the norm in South African ecotourism projects was to adopt a participatory approach primarily in terms of its public relations value (Woodwood, 1997). Similarly, Scheyvens cites the work of the Conservation Corporation of Africa (CCA) as an example of an organization that she believes works with local communities only out of a sense of economic pragmatism rather than a commitment to the communities themselves (Scheyvens, 2002). CCA is a private company, not an NGO. Scheyvens quotes and reproaches the Phinda reserve manager, who acknowledges that the compliance of the community is on the basis of: 'If they poach, it's not us they're stealing from but themselves', rather than a philosophical commitment to greater democracy and equity (Scheyvens, 2002: 92–3).

Yet is this approach, roundly criticized by Scheyvens, so different from the alternative examples she and others cite as being progressive? Private companies may introduce participation on an instrumental basis, for its public

relations value. In the case of the conservation and green development organizations, there seems to be a similar instrumental approach to participation – it is participation *for a specific end*, an end no more the product of the community's unfettered desires than in the case of the CCA in the above example. And Midgeley's statement, referred to above, that community participation is 'deeply ideological' (Midgeley, 1986: 4) holds true with regard to the neopopulist alternatives too – these alternatives have been developed in, and are funded from, a particular milieu in the developed world. They, too, are ideological – that they emanate from civil society, rather than government or commerce, does not preclude this.

Within the NGOs, too, there is criticism and self criticism along similar lines. It is widely argued that there is room for improvement. For example, Tourism Concern consistently take to task NGOs for their lack of meaningful community participation, and the resultant failure of communities to benefit adequately from tourism ICDPs (e.g. Tourism Concern, 1995). Conservation NGOs such as WWF and CI stress community participation in their literature, and are critical of their own conservation policies of the past, policies regarded by some as 'fortress conservation'. Indeed, CI, an NGO at the forefront of developing tourism ICDPs, was founded following a split in the American conservation NGO Nature Conservancy on the issue of the importance of community involvement. NGOs generally appear implicitly aware of the criticisms of community participation as tokenism, and are keen to place it at the centre of their work, perhaps in response to these criticisms.

Yet while community participation remains such a central, and contested, focus of tourism ICDPs, what the NGOs and the vast majority of the literature share is a critical support for the broader, underlying project of integrating conservation with development in impoverished rural communities, and hence a focus on the non-consumption of natural capital as the basis for economic progress. This 'bottom line' is associated with sustainable development, and is not substantially challenged or interrogated within the case studies or the associated general literature. Thus, that community participation itself could be a conduit for an imposed agenda is overlooked. It is conceivable that this may have something to do with the moral force of the invocation of 'community' and 'sustainable development' (Butcher, 2003), and also of the apparently agenda-less civil society roots of the NGOs (Kumar 1993).

Participation: a Radical Agenda?

It is notable that community participation is often viewed by its NGO advocates as radical, as a counter to over-bearing governments and the rhetorical free market agenda associated with the big global financial institutions – the World Bank and International Monetary Fund (IMF). This is the tenor of Scheyvens' '*Tourism and Empowerment*' (2002) and of Tourism Concern's '*Community Tourism Guide*' (Tourism Concern/Mann, 2000). Yet the radical rhetoric of 'empowerment' and 'community control' masks a *shared* outlook with the proponents of the free market rhetoric these authors claim to oppose.

This is clear if we compare the new policy agenda (the term sometimes given to the 'new right' emphasis on markets in development, especially in the 1980s and subsequently), and the alternative development paradigm (the alternative, 'people'-oriented view of many NGOs, often associated with the Left, and strongly associated with the promotion of community participation). The alternative development paradigm, situated in the cultural and environmental 'left', has increasingly turned away from the state, associating it with failed grand development schemas, and has adopted a neopopulist localism in its place. One author puts it frankly: 'Putting people in the centre of development implied removing the state and its agents from that centre' (Tandon, 2001: 53). From the perspective of the new policy agenda, the developing world state was an inefficient and bureaucratic burden upon business, and needed to slim down and adopt a set of free market-oriented policies (a view developing world states were impelled to take on board in order to benefit from debt relief under structural adjustment policies from the 1980s onwards). The principal shared assumption between these two apparently contrary viewpoints is a diminished view of state sovereignty (Streeten, 1997; Adams and Hulme, 1998; Hudock, 1999).

Following this logic, some have argued that, be it unwittingly, NGO local interventions such as ICDPs have become implementers of the new policy agenda (Bebbington and Riddell, 1996) and that in many instances they have become, in the eyes of funders, a 'favoured child', and the 'preferred channel for service provision *in deliberate substitution for the state*' (Edwards and Hulme, 1995: 4–5) (my italics). This view is developed by Midgeley in a keynote article titled 'Social development: the Intellectual Heritage' (Midgeley, 2003). Midgeley points out that the role of the third world state in social development has been curtailed by debt, fiscal difficulties and the imposition of structural adjustment (2003: 831). It is this reduced capacity to intervene in their own societies that has created a space for the growing role of external agencies. We could also note that the earlier post colonial decades, up to the 1980s, decades in which African states were stronger and NGOs played little role, generally witnessed gains in human welfare, education, longevity and health well above those of the last 25 years, years in which NGOs have become key actors in development.

Viewed in this light, the grand claims of empowerment may need to be tempered by a rather harsher political reality – political agency, measured by the ability to have some control over the trajectory of one's society, has declined as local participation has increased, and the latter is implicated in the former.

Conclusion

It is a truism that, in any given circumstance, it would seem to be better to seek out the views of those affected by development, even if this results in only minimal change to the development project itself.

However, the claims made for community participation go a lot further than this. Community participation in tourism ICDPs is presented as an ethical approach to development, running counter to previous forms of development that did not seek to involve the community. It is presented as having the

potential to substantially shift power over development to the communities affected themselves. Formally, community participation may be very thorough. However, the extent of choice over what is being participated in is very limited. It would seem that participation is instrumental – it acts as a means to organize and involve, and to give people a stake in tourism ICDPs. Ultimately, community participation is about negotiating the terms on which a project is to be implemented, rather than about the nature of the development project itself. To engage with this may simply be the pragmatic option for communities, given that available aid funding is linked to the acceptance of these projects.

As such, 'control', 'empowerment' and 'democracy' – all implying agency – need to be tempered by a recognition that community participation on the part of the NGOs is intrinsic to a *particular* development agenda, an agenda shaped externally. In so far as it serves to legitimize that agenda, by attaching democratic credentials to it, it could be criticized as contributing to a limiting of development options through a narrowing of the development agenda to that which is local, small scale and 'sustainable'.

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3 Is Tourism Fair? What the Figures Do Not Tell[1]

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Motto:

Reality can be transformed only if it can be seen in a different manner (Franz Kafka)

> *Recognizing the important dimension and role of tourism as a positive instrument towards the alleviation of poverty and the improvement of the quality of life for all people, the potential to make a contribution to economic and social development, especially of the developing countries, and the emergence as a vital force for the promotion of international understanding, peace and prosperity.…*

This statement from the United Nations General Assembly resolution acknowledging the Global Code of Ethics for Tourism accurately reflects the various hopes and convictions which have accompanied modern tourism for decades since, in the aftermath of the Second World War the exercise of the right to paid holidays became commonplace in Western and 'planned economy societies'.

Similar statements have been heard or adopted at numerous international conferences, particularly where they gathered government and industry representatives of the tourism sector. Among political forums, in the Conference on Security and Cooperation in Europe (CSCE), held in Helsinki as early as 1975, references to tourism as a way to promote human contacts between East and West, i.e. across post war borders, which CSCE acknowledged, helped overcome problems in 'Basket 3' and successfully conclude the event.[3] In the confrontation between the two blocks 'freedom to travel' became an overriding challenge. In a larger international context, as tourism has increasingly become a commercial phenomenon, the official expectation has always been that international tourism ('trade in tourism services') should help poor countries in attaining economic growth and social development. This objective is also fixed in the UNWTO Statutes of 1970. Recently, due to the United Nations Millennium Development Goals (2000), the emphasis has been somewhat narrowed to

poverty alleviation. There seems to be a summary message in there: as people become freer to travel, a better, more equal world will result. The purpose of this chapter is therefore to look critically into some parts of this assumption. It will be based on the figures and facts which are usually quoted in order to illustrate tourism's gains, growth and potential for social and economic development. One can see a serious shortcoming in the data as analysed in international forums: they are almost exclusively available for international tourism and ignore the facts regarding the domestic market where most travel occurs. In a global market consisting of 'destinations' this separation is becoming increasingly obsolete, but is nevertheless important in the context of international trade.

It can reasonably and safely be assumed that demand for international travel has now been firmly established in modern societies and that it will be followed suit from within emerging economies. Despite a minor setback suffered between 2002 and 2003 due to 'fear to travel' seen from reaction to terrorism, and other critical factors, basically of health nature (SARS, avian influenza), international tourist arrivals increased in 2004 by 10%, and the following year picked up again by 5.5%, bringing the world number to 808 million[4]. By the end of 2007 it reached the nearly 900 million mark. The UNWTO forecast of the mid-1990s establishing the volume at 1.6 billion in 2020 seems to rest strongly on its feet. The forecast also indicates important changes in the structure of arrivals: Europe (including Israel, Turkey and the whole of the former Soviet Union) would have decreased its market share from 60% in 1995 to 46% by 2020, while that of East Asia and the Pacific (including China) may increase from 14% to 25%. That of the Americas may drop from 19% to 18%, and that of South Asia from 2% to only 1% in 2020. The share corresponding to the Middle East (excluding Israel, but including Egypt and the Gulf countries) would grow from 2% in 1995 to 4%, and that of Africa (51 countries) from 4% to 5% in 2020 (a major share of Africa's international tourism in 2005, 59%, corresponds to just five countries: Morocco, Kenya, Tunisia, Mauritius and South Africa).

Should these predictions come true, they would contradict the assumption, or prove the lack of faith, in that tourism is going to represent a significant development role for poor countries, for example in Africa or South Asia (which includes India, actually a highly developing tourism destination and an emerging global economy alongside China): slightly doubling the number of international tourist arrivals in Africa during 15 years will unlikely improve its economic standing. On the present performance side, however, Africa as a whole experienced a strong increase in arrivals in 2005 and 2006 (so it may well be necessary to reconcile the new international tourism trends with the expected numerical output and structure of arrivals in 2020). It is clear that rather than arrivals, the actual expenditure of international visitors are more important for the recipient economy. Again, to compare with other regions, in Africa it is the smallest in terms of volume – 3% – and in absolute terms per arrival – US$ 550 against the world average of US$ 820 in 2004. There is also plenty of evidence that the structure and nature of foreign tourist expenditure does not reward desirably the African economy and the region's endowments. This issue alone requires special analysis in considering the developmental role of international tourism.

There is no doubt that international tourism is a major item of formal international trade[5], even though presenting data in this regard: by IMF, UNWTO and WTO (trade) is not yet unanimous (but on the road to agreeing on uniform interpretation). Actually international visitor expenditure (including that of 'tourists' and one-day visitors) on destination country goods and services, but excluding international transportation needed to reach destinations, can be considered as number 4 export category (28.4% in world exports of commercial services in 2005), after fuels, chemicals and automotive products. Note is taken that fuels and automotive products make travel feasible, therefore considerable demand for these items is also driven by travel demand. However, on a long-term, international tourism dynamics appear lower than overall merchandise trade (7% against 10% of average annual percentage change between 2000 and 2005).

Regional data discussed earlier have already indicated the direction of international tourism demand. Since 1950, when comprehensive statistics in this area came into being, notably thanks to the efforts of IOUTO, UNWTO's predecessor, sweeping changes have taken place testifying to more 'equality' in the spread of international tourism. While, in 1950, only 15 countries captured as much as 97% of demand, in 2004 the first fifteen accounted for 'only' 58%. The share of the first fifteen in 2004 was still considerably smaller that that of the first five in this respect in 1950 – USA, Canada, Italy, France and Switzerland – as it was 71% at that time. The list of 1950 was led by USA and closed by Denmark, that of 2004 by France and Poland respectively. Between 1950 and 2005 three countries, USA, France and Italy, were always among the first five. Spain was in the second five in 1950, and in 1970 it was already in the first five and so has continued until today. Germany and the UK have always been in the second five, and the new entrants in the first fifteen in 2004 include China (without Hong Kong), Mexico, Turkey and Malaysia. It is also interesting to note that among developed economies neither Australia nor Japan have ever reached the first fifteen 'destination status'.

Those who receive most international tourists are also, by and large, those who absorb most tourism income, however, among the first fifteen, four countries: Australia, Greece, Japan and Switzerland earn more than Hong Kong (China), Hungary, Malaysia and Poland, who on the other hand outnumber the former in terms of international tourist arrivals. Out of the fifteen who earn more, there are ten who also spend more in absolute terms, the other five are the Netherlands, Russia, Belgium, Hong Kong (China) and Sweden. Per capita, USA spends twice as much, Japan three times as much, and Sweden ten times as much as Russia (US$109), while the latter 10 times more than China (US$12). The absolute record of US$ 1.934 per capita belongs to Hong Kong (China).

While reviewing these figures in both absolute and relative terms and bearing in mind the adverse factors which have beset international tourism demand for the past 15 years, a number of conclusions relating to its nature and status become manifest:

- leisure tourism has become an established item of consumption and lifestyle in developed societies and a desired item of consumption in the developing world, but it is not a basic necessity

- business travel has become part of work lifestyle
- tourism demand, especially in its leisure part, is resilient to external shocks thanks to its flexibility and volatility as replacements are easily found from among competing tourism destinations
- market shares are progressively changing with the emergence of new destinations and improvement of their economies. Tourism development is the consequence of economic growth.

There are still a number of research questions which should be answered in order to explain better the performance of international tourism in all economies, developed and developing alike. The fundamental role of domestic tourism demand has already been mentioned: it is very high in all the countries – on average four times higher, at world level, than international tourist arrivals – who generate demand for travel abroad and who receive large numbers of international visitors. In some developing countries, for example, in Central America, expatriate tourism to the country of origin may play a very important role. The same countries usually enjoy large volumes of remittances from their expatriates. If they come from income earned in the tourism sector of other economies, then they can be related to the supply of tourism services known in the World Trade Organization terminology as *'presence of natural persons'* (mode 4). In other words, facilitating and promoting this mode (not emigration) can contribute to disseminating positive spill-over effects of tourism and more economic equality without necessarily resorting to tourism development in mode 4 origin country.

The other question relates to the type of travel motivation: under the general term 'tourism' (used by the United Nations and UNWTO) most people, and tourism policy makers as well, understand holiday travel, while the general figures actually conceal a great variety of motivations, such as all kinds of business travel (some 16% at international level) to start with. In countries and travel destinations like Germany, Hong Kong, New York or Madrid, this may be one of the main purposes of travelling there. It certainly gives rise to profitable operations of tourism companies, perhaps more rewarding in commercial terms than packaged or all-inclusive tours. Possibly due to holiday bias, the general figures neither tell us about the performance of various tourism industries, although often available at national level in developed economies. Contrary to international merchandise statistics which inform in great detail about single traded items, little is known about specific tourism products. What about the cruise industry, rent-a-car, or conventions, what about hotel chain operations? Are the profile, number and volume of package sales increasing or stagnating? What is the actual turnover of ecotourism? And how do they rate between domestic and international tourism in terms of valued-added? These questions are relevant in choosing and implementing development options and strategies. The existing scattered data, at national and industry levels, are not brought to an international standard and their absence in international analysis makes it rather sterile and boring.

Perhaps even more urgent would be to monitor tourism development in terms of qualitative indicators. Attempts have already been made (UNWTO,

UNEP, UNCTAD) to draft such indicators under the label of sustainability, but the problem is that they are hardly implemented in actual policy making and destination management (destination management appears actually as image management). The overall concern continues to be numerical growth which overshadows development in its quality-of-life sense. General tourism figures do show trends and satisfy curiosity about rankings, basically in absolute terms – which may inspire major players in the market, and first of all provide information of political value, but they are impossible to translate into specific company action and tourism policy measures. A small country such as Malta will perhaps do much better in terms of tourism's profitability, but the headlines will focus on big countries which by the virtue of their size will naturally produce more impressive figures of arrivals and receipts.

Hopes are entertained in this regard with the data to be derived from the Tourism Satellite Account (UNTSA): over 70 countries and territories are reported to have already used or initiated this methodology. Some of its output is even already being published by UNWTO, but the real challenge is, at national level, to make informed use of the obtained data to support or guide tourism policies. While this can happen from within Governments one day, it is also imperative to produce tourism policy – friendly research and support government action by its findings.

Despite the ubiquitous nature of tourism, its impact on lifestyles and the environment, and continuous claims of its economic and social importance, it comes as a tremendous surprise that the sector has hardly been considered so far in the current debate on globalization – the sectoral research output, otherwise impressive, does not actually reach 'non-tourism researchers' and the sector is not analysed in close relation to other productive and social activities in mainstream economic and sociological research of world outreach. It is rather analysed apart, not 'as part'.

There should be no doubt that tourism is a powerful agent of globalization. Distinctions should be made between the factors which have made it global, for example better access to tourism consumer finance – credits and payment by electronic means – similar to other consumer commodities, and the endogenous tourism specific factors which contribute to the process: easiness of physical access, expansion of transportation networks, use of wide-body aircraft and low-priced air transport, combining entertainment and access by cruises, or do-it-yourself travel through information and communication technologies (ICTs). The excuse of leisure 'residential' tourism has helped express and materialize massive demand for second or third homes and other real estate options: between East Asia, the Mediterranean, the Pacific Coast and the Caribbean.

The effects side shows tourism product ubiquity and versatility, the search and presence of common international standards, whether commercial or public, and global competition, which has deepened polarization between budget and up-market travellers across international borders, hence, as it grows, tourism contributes to inequality in consumption. Despite claims and efforts to preserve national and cultural differences and identities, there is creeping uniformity and acculturization, as well as increasing and ubiquitous overcrowding going even beyond seasonal peaks. Even a small injection of

commercial tourism in traditional societies may give rise to an abrupt societal change. The human face of tourism as a service industry is eventually sacrificed due to the industry commoditization and discount-led race: it neither promotes quality products nor quality of life for host communities.

Even though there are numerous initiatives and accomplishments aimed to make tourism environment- and resource-friendly, its predominant part is now under the suspicion of being a modality of irresponsible and hence unsustainable consumption. A very recent 'discovery' in this respect is that the leisure sector in the Mediterranean and the construction sector supporting it are responsible for important greenhouse emissions. This model therefore should not be a development solution for poor countries. Otherwise their fragile natural and human resources, ecosystems, and energy needs would be put under heavy and unbearable pressure. Also, as any other economic and human activity, tourism has inherent growth limitations, especially if it sits on the use of dwindling resources such as energy and water, which need to be reckoned with and reconciled by public-private negotiation and planning.

Based on the fact that international tourism already ranks very high among poor countries' exports (first or one of the first items in most LDCs), it is nevertheless expected that tourism can accelerate growth and therefore should be placed high on the development agenda, for example, by means of domestic and foreign investment. However, at present, LDC endowments, internal structures and underdeveloped economy cannot absorb big numbers of international leisure visitors and there are neither important business opportunities there to make business travel another option. The cost of creating infrastructure for tourism facilities so as to attract dozens or perhaps hundreds of millions of leisure visitors and take them away from other destinations would be very high, therefore LDC governments can hardly be persuaded, when asking for international assistance, to put tourism before other urgent development needs and options such as sanitation, education and basic infrastructure. But these are also the conditions which could be beneficial for tourism. The challenge is therefore what should come first, whether indeed investments in the tourism sector can make it a driver or engine of economic and social development, which is often claimed.

All the numerical data which have been reviewed before suggest that the tourism sector can play this role only if the actual growth model of tourism economy is well grounded in the overall economy and that tourism consumption and therefore supply of tourism services are more a result of economic development than its primary cause, and the rule can be that the more developed the national economy, the more tourism can contribute back to this economy in terms of job creation and value-added. The data also clearly show that those who most benefit from international tourism are also those who spend more than others on tourism services, both at home and abroad. This is definitely not the case of developing countries and LDCs in particular.

It therefore comes as no surprise that this constraining reality can hardly be overcome to the benefit of tourism and the developing country economies in the current multilateral trade negotiations of WTO aiming at progressive liberalization – unless indeed concessions and special conditions are offered by

developed economy members, which would require finding ways of effective cooperation for this purpose between their governments (who negotiate) and business companies. Now there is little link, if any, between commitments on commercial presence and effective foreign direct investment (FDI), and no direct links between liberalization and social improvement in developing countries thanks to commercial presence fixed in the GATS agreement. Actually autonomous or bilaterally negotiated liberalization can prove more effective and a number of other conditions are necessary to attract FDI. It also appears that FDI in the tourism sector is presently being replaced by non-equity investment (such as management contracts or franchises) making the tourism sector possibly the least globalized in terms of 'hard' or direct investment. But even FDI is not sufficient: countries or tourism destinations also need to better control the product, its contractual conditions and the price to obtain fair economic and social remuneration from production factors employed in the tourism production and distribution cycles.

A frequent claim is that tourism contributes to progress, international understanding and peace, and that it improves quality of life. However, the more tourism is regarded as a commercial or mercantile activity, the more its effects make it similar to other sectors in the delivery or non-delivery of these objectives, in other words, such objectives can hardly be achieved. As just another mode of consumption, tourism, especially its holiday part, simply reflects, or may even accentuate and deepen already existing economic and social inequalities. Due to massification, combined with the way in which natural resources and energy are used for tourism consumption, the growth of the sector naturally produces more business activities and creates more wealth, but at the same time tends to increasingly deteriorate travel conditions and the quality of life of neighbourhoods next to tourism hubs. Those parts of tourism, which do contribute to international understanding, include business travel and meetings, social forms of tourism, cultural exchanges, community tourism or ecotourism. On the other hand, social sensitivity around tourism and cultural marginalization of the groups which do not partake, have led to the extreme of tourism sites and interests becoming a target of aggression and terrorism which bounces back by humiliating 99.99% *bona fide* travellers as potential suspects and by infringing individual liberties and privacy.

On the whole, numerous platforms and relations of inequality in demand, supply and the remuneration of factors of production in tourism have become manifest. The first platform of inequality refers to effective travel demand. When it comes to international travel, we refer to the 900 million mark in 2007, but this impressive volume conceals a great number of multiple trips by a relatively few individuals. Perhaps only 5–7% of the world population can travel abroad. One can talk of two major classes of people: the local majority class, 'those condemned to live in their local world which they cannot leave', and the global minority class, 'citizens' of the world', consisting of leisure and business travellers as broad categories. The first group does not benefit but rather suffers from globalization; its only travel potential is determination to emigrate. If successful as immigrants, their improved economic status in the recipient society may give rise to their leisure, visiting friends and relatives (VFR) or even business travel

potential. The second group is clearly a beneficiary of globalization. It may choose tourism as a lifestyle or adopt it as a way of consumption, or use it as a work modality (business travel). It may also freely choose emigration as a life option, not as a must. Curiously, it is also within this group, among scholars and civil society militants, where claims of equality are heard most.

In society, there are inherent factors which make many people unfit to travel. The lack of economic resources or disposable income naturally comes first. It is unlikely that those who live in the poverty bracket, even in developed economies, would be ready to travel for fun or business. While the more affluent practice unsustainable tourism consumption, it also reduces tourism opportunities for the economically less privileged. The type of employment, in the service sector, or on short-term and precarious contracts in developed economies, or in agriculture in developing countries, represents another barrier to travel. Then comes social marginalization and disability. In the latter case, even markedly opulent societies still have not been able to ensure adequate travel opportunities for their members with disabilities – even if the individuals concerned have their own funds which could be used for this purpose – due to unprepared or otherwise hostile travel environments.

Political and administrative 'freedom to travel' continues to be a challenge for the majority of world population in terms of entry visas, complicated procedures to obtain them, and discriminatory fees. After travel formalities were significantly relaxed in the 1990s, basically in Europe, new red tape in this area has come into place due to security and emigration concerns. The most privileged citizens in this respect, from Denmark and Germany, still need entry visas to cross borders of 86 countries and territories, and those from the last less fortunate 100 require permission from 169 to 205 countries or territories to be visited (the group starts with Botswana and ends with Afghanistan, but also includes Bahrain and United Arab Emirates, Colombia, Cuba, China and Lebanon). On the other hand, 9 countries, including Andorra, Maldives and Seychelles, do not ask for entry visas from anyone. There is certainly a coincidence between the countries whose citizens are denied permission to enter without a visa and those who are 'feared' to produce emigration, i.e. poor countries, however the countries which are poor in general terms also feature prosperous groups whose potential to travel abroad is discouraged or aborted altogether. Speculative estimates put the loss of gross income from international tourism due to visa/work permit requirements at some 36% of the possible total, or 42% of the amount actually earned.

A positive agenda is possible to achieve a more equalitarian society in terms of access to tourism: to develop new forms of social tourism; further promote, consolidate and implement the right to rest and paid holidays; continue creating enabling physical and services environments for people with disabilities, including seniors; handle visa policies and measures in a new, visitor-friendly manner (including through the use of ICTs) and remove political or ethnic bias in this respect; also to promote sustainable tourism production and consumption. Another equality platform seeks a fair balance in sharing economic benefits and value-added from tourism activities. The current majority situation attributes to distributors the power to dictate the product, contractual conditions and price,

therefore competition occurs among distributors rather than direct producers. Important factors of production, such as local intangible resources and skills, actually used or which could be used as assets in the tourism value chain, are seen not to be rewarded in an equitable manner, and not according to effort but productivity and dominant position, so as to ensure economic and social sustainability of tourism activities at local levels.

A number of solutions to this problem have been attempted or are already in place on a small scale (in particular by means of community tourism). They require changes in corporate and government practices, strengthening community or local tenure over resources, creating a competition-friendly regulatory framework at all stages of production and distribution, capacity-building at local levels, monitoring performance according to fair trade indicators, or the enhancement of quality in diversity to gain a local competitive base. Relationships between consumers and tourism service suppliers, both private and public, are yet another area of concern on the equality agenda, even though consumers are considered to be the ultimate judges in accepting or refusing the tourism products which are made available to them. In a global market, while tourism consumption is already deeply ingrained, their situation is becoming largely vulnerable at various stages of the value chain. A few factors contribute to weak consumer status: the lack of public international standards, the lack of effective polling of consumer views to agree on standards, consumer dispersion, apparent low consideration of services in relation to the core consumer rights dictated by the *UN guidelines for consumer protection*, the lack of effective redress channels in international tourism, no compensation for redress effort, or consumer passivity largely due to consumers' captive status in various strategic parts of the production chain (e.g. airports, governments requirements and services).

The place of the natural environment and its resources again needs to be brought into the picture to discuss yet another platform of apparent inequality, in the sense of controversy between technology and market forces on the one hand and the natural environment on the other. The latter may suffer in the short-run, but then bounces back in the long run. It can be observed that technologies used for tourism projects, or their specific applications, continue to be largely not natural environment-friendly. The natural environment is fragile in confrontation with heavy tourism investments whereby sustainability appears as an appeasing catchword, but the attainment of sustainability objectives cannot be empirically verified during the return period of commercial tourism investments. All in all, the natural environment does represent a symbolic commercial value, but is not remunerated on par with other factors of production. There is therefore a need of according commercial value to the natural environment, or to adopt another measure to value it accordingly, which would require a difficult political agreement at international level. Still, rigorous national and international regulations aiming to protect the environment already exist. Their implementation should be continued and enforced. Local communities should be made especially sensitive and active in keeping the environment clean, and should build their capacities and development agenda around this objective.

Conclusions

Ensuring more equality in tourism cannot be achieved without implicating national Governments in this era of creeping and all-involving globalization. In a global market, characterized by capital mobility, liberalization of trade, the shifting of economic power from national economies to transnational companies, competition and commoditization, 'only a strong State may ensure may ensure the internal and external functioning of transnational market regulations'. One of the challenges is that of parallel political and administrative decentralization where local egocentric, egoistic, but also legitimate interests due to the apparent lack of other opportunities contrast with global problems. The role of national governments can be systematically reviewed and reinforced in this respect. First they need to show political zeal: be capable of reconciling particular interests of stakeholders, foster partnerships between the private sector and civil society (citizenship) and negotiate and harmonize local interests. They should put in place visible tourism policies by setting tourism development objectives and priorities. Finally, such policies must be substantiated by measures which can be administrative, regulatory and legal; economic (such as assistance to demand and supply by means of incentives, subsidies and fiscal measures); and operational consisting of Government-funded or assisted services.

There is a role for the international community in this regard. Through international organizations (members, structures, procedures, resources…) it reflects the level of awareness of global problems and the level of consensus and political will reached at national levels to deal with global and common problems, builds international Public-Private-Civil Society partnership from the base achieved at national levels, agrees on common policies and measures, whether binding or voluntary. National governments are again the core agents to agree on this approach. In so doing, they must overcome their own limitations and bias: to put policies before politics and to remedy the loss of corporate civil service knowledge and the consequences of uncommitted outsourced research, which is currently on the increase. These concerns may give rise to a new agenda for tourism research: to include basic research to substantiate long-term policies and help translate research into policies and measures; to shift from 'sectarian' to truly sectoral comprehensive research regarding tourism as part of the economic system and from numerical forecasts to qualitative ones. Research should also help promote sustainable production and consumption in tourism, which appear as holding the true key to achieving more equality in tourism.

Endnotes

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2007) of the World Tourism Organization (UNWTO). The views expressed in this chapter do not pretend to reflect the official position of the Organization or any of its Members.

[3] IUOTO, UNWTO's predecessor, submitted to CSCE the report "Integration of European Tourism Supply"

[4] UNWTO World Tourism Barometer

[5] Disregarding trade representing trafficking in drugs, armaments, human beings and other illicit trade.

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4 Western Money for Southern Sympathy: How the Tuareg from Timia are Instrumentalizing Tourists to Support their 'Exotic' Village

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Drought in the Sahara: Tourists Help Tuareg Nomads

In November 2004, the traditional salt caravans of the Tuareg nomads from the Aïr Mountains were heading south, but this time the camels did not carry any salt at all. They had not walked the 700 miles of dryland through the Ténéré desert to pick up the 'cantus' from the oasis Bilma, as the Tuareg nomads are used to doing every year at the end of the rainy season. During the summer of 2004, rainfall in the West African state of Niger was so poor that the camels did not find enough pastures to feed on. In addition, huge swarms of locusts devastated all that survived the sun's scorching heat. Therefore, there was not enough food in the Aïr to make the camels strong enough to survive the long and exhausting march through the desert. To save at least the lives of their camels, their main form of wealth, the Tuareg nomads had to head south without their merchandise to reach more humid zones, where their animals could find pasture to graze.

About 6 months later, in the late spring of 2005, the first caravans returned from the south. But this time, they did not carry new stocks of millet, the staple food of the Tuareg nomads. In the south, a lack of rain had caused a terribly bad harvest. As a first consequence of this catastrophe, the price of millet rose to five times its normal price. For the majority of the population of Niger, struggling to survive even in 'good' years, this marked the recurrence of a terrible famine last seen on this scale between 1980 and 1985. At that time pictures of dying babies on western TV screens led western governments to combat the human tragedy; this time, the silent suffering of millions of people was overshadowed by the daily news about the 'victory' in Iraq.

With great luck, the Tuareg nomads from the region of Timia in the centre of the Aïr Mountains managed to survive this menacing disaster, thanks to a

campaign by the non-governmental organization 'Les Amis de Timia' (www.lesamisdetimia.org), founded by a former Sahara tourist, Michel Bellevin. The campaign collected some 17,000 Euros from hundreds of former visitors to the village and through them other supporters from France, Germany and Austria. With that money, 52 tons of provisions were purchased to tide over the 20,000 people living around Timia until the next, hopefully better, harvest.

The main question that this emergency measure raises is whether the people of Timia would have survived without the immediate support of former visitors to Timia and without the unhesitating reaction of enthusiastic Sahara travellers? To what extent does ethno-tourism play a crucial role in focusing western attention and creating solidarity? Can this kind of tourism serve as a substitute for missing media attention and a lack of governmental emergency measures in addressing humanitarian disasters in remote places? In this respect, the contribution of former tourists to exotic cultures can be interpreted as an expression of growing global solidarity, initiated and strengthened by positive tourist experiences with 'exotic' locals. This assertion arises from a field study about the sustainability of tourism in the Tuareg region of Agadez in the central Sahara conducted by the author between 1999 and 2004 (Friedl, 2004; 2005a). The aim of the study was to determine whether regional tourism endangers the nomad culture of the rural Tuareg population. A variety of methods was employed to answer this question:

- To determine the structure and dynamics of the regional tourism market, qualitative interviews were conducted with 30 managers of local tour operations, which represent 95% of the regional market.
- To analyse the politics of the European travel businesses marketing travels to the region of Agadez, the homepages and catalogues of 24 travel businesses offering 600 tours were evaluated, which covered 98% of the relevant market.
- To understand the motives, expectations and experiences of visitors travelling to the Agadez region, 56 qualitative interviews were completed with tourists from German-speaking countries (69%), France (21%) and English-speaking countries (10%).
- To determine the opinion of the Tuareg population in question, 45 inhabitants from the village of Timia were interviewed (guided interviews). The interviewees were between 17 and 67 years old and represented all main fields of local economic activity. Seventy-three per cent of them were male.
- To evaluate the validity of the Timian interviewees' answers, the interaction between tourists and locals was also observed for a period of 2 months.
- Finally, the author escorted several tours of the local tour operator, 'Tchimizar Voyages', to evaluate its ecological, economical and sociocultural effects for the local population.

Tuareg Nomads: Mythic Masters in the Art of Survival in the Sahara?

The Tuareg people are part of the Berbers, the autochthon population of North Africa. As a consequence of the Arabian occupation of the 7th century, they moved

south into the region of the central Sahara. Today, they live as minorities in several states of North and Western Africa (Libya, Algeria, Niger, Mali, Burkina Faso and Nigeria). Until the end of the 19th century, the former 'Lords of the Sahara' were politically dominant, controlling the main trading routes through the Sahara. One part of their economic base was Rezzus, raids against peasant settlements.

The French colonial subjugation at the beginning of the 20th century had a significant impact on the heterogeneously organized Tuareg people's political, economic and social life. While former politically dominant groups had to choose between subjugation and expatriation, some groups such as the Kel Aïr people from the Aïr Mountains profited from the new French order. This group of the Tuareg has a specific social background; they have neither been subjected by other Tuareg groups nor have they subjugated any other group. In consequence their socio-political system did not become feudalistic and hierarchical as was usually the case among Tuareg societies (Bernus, 1993). Similarly, their economic system differed a great deal from the other Tuareg as they practiced a strategy of risk-management combining goat- and camel-breeding with caravan trade and horticulture. Before the French occupation, their main economic problem was caused by the common Rezzus against their caravans as well as their oasis villages. This situation changed dramatically under the new French order, resulting in the salt caravan trade, connecting the salt oasis of Bilma in the Ténéré desert with the cattle-breeding south. Furthermore, there was a significant extension of horticulture within the Aïr Mountains (Spittler 2002: 17).

Most of the French officers were aristocrats who perceived the Tuareg as their cultural counterparts abroad, interpreting them as noble, feudal knights of the desert, legitimate lords of the 'primitive' black, partly enslaved population, archaic inheritors of the erstwhile French knighthood and so, consequently, their equals (Pandolfi, 2004: 4–7). To preserve their ideologically-based assumptions about the 'noble' Tuareg, the French colonial officers pursued an ambiguous colonial policy. On the one hand they subdued the black population under the French ideals of self-determination, enlightenment and modernization by forcing them to attend French schools, and on the other hand, they protected the Tuareg against social change by supporting and subsidizing their traditional structures, such as nomadism, the caravan trade and folklore (Bourgeot, 1995: 85).

The consequence of this 'strategy' became obvious after the independence of the West African states. Suddenly, the Tuareg found themselves without their former economic and political resources and without the support of their French 'benefactors'. Under this new order, they were forced to adopt the role of a maladjusted maverick within the national state. They were destined for doom as they found themselves confronted with a terrible drought, followed by destructive famines in the 1970s and 1980s. To survive, thousands of nomads had to leave their devastated homeland for refugee camps in Algeria, subsidized by the European Community.

Many of the young nomads, having lost everything, became Ishomars, a Tamasheq word rooted in the French expression chomeur (unemployed). They had no option but to follow Libyan President Muammar al-Gaddafi's call to become a fully accepted member of the Islamic Army, Gaddafi's anti-colonial military intervention tool in Chad and Lebanon (Salifou, 1993: 43).

Tuareg and Sahara tourism: a Passionate Contradiction?

Restoring the honour of his Tuareg people was the goal of Mano Dayak (1996b: 178), a nomad born in the Aïr Mountains, who had an impressive career, eventually receiving a university diploma in France and gathering a number of famous, important and influential French people around him. His main ability was to understand and to exploit the fascination of the French for 'their' Tuareg. Back in Agadez, he started to develop tourism in the region, the northernmost part of the West African state of Niger, consisting of the volcanic Aïr Mountains, saurian graves and the Tuareg culture, the vast Ténéré with its unique, huge sand dunes and the impressive eroded plateau of Djado far in the east with its rock paintings. For Mano Dayak, tourism was a kind of development tool to support his people by creating jobs for nomads as drivers and tour guides, and by subsidizing nomad villages with the profit from his tourism agency 'Temet Voyages'.

Thus arose a paradoxical situation: on the one hand, Mano Dayak used the Tuareg culture as a kind of marketing tool to bring tourists into the area occupied by the 'knights of the desert', but on the other hand, he absolutely condemned 'zoo tourism' (Dayak, 1992: 78; Dayak, 1996a: 178). This term was used by Mano Dayak to describe his perception of the interaction between tourists and nomads, understood as an unequal relationship between powerful observers and victimized, gawked-at objects. Rather than rejecting all contact between the nomad population and western tourists, he favoured a kind of controlled personal experience for tourists. Their Tuareg escort should serve as a kind of exotic, reliable guide and friend out there in the dangerous, fascinating Sahara. Certainly, the frame of this theatre (Goffman, 1983: 7) was always the tourist group as a sort of 'environmental bubble' (Urry, 1996: 836) within the alien world of the desert.

Mano Dayak was quite successful with his project. Thanks to his excellent contacts with French journalists and the elites of Paris, weekend trips to Agadez and to the dunes of Temet became a booming business. This involvement of the media also led to a growing popularity of the Tuareg among their French admirers. One of the top events of the tourist season in Agadez was the Paris-Dakar Rally, when drivers took a day off there, at the 'door to the Ténéré'. Since Mano Dayak had almost a monopoly on the local tourist business and such good contacts to the French media and the management of the Rally (Thierry Sabine), he was able to earn and invest significant mounts of money for the construction of wells, nomad schools and health centres in the Aïr Mountains without 'bothering' the Tuareg with tourism.

The rural population did not always agree with this paternalistic policy. In the early 1990s, the people of the nomad village of Timia started a 'rebellion' against this artificial isolation from tourism. Although situated directly on the main dirt road through the Aïr Mountains, the Kel Timia had been forced to watch the Mano Dayak's tourist groups pass them by without a visit. As they put it, the tourists 'left nothing but dust'. They asked Mano Dayak for more active participation in tourism activities. Finally, he promised to change his policy, but the emerging rebellion of Ishomars in the meantime caused the total collapse of tourism in Niger for more than 5 years.

In the early 1990s, the new, democratically elected government of the Republic of Niger invited the Tuareg refugees in Algeria, as well as the young Ishomars fighting as mercenaries for Gaddhafi, to return to Niger. There was even a programme to integrate the Ishomars into the national security institutions, financed by European Community funds. Once again these people found themselves in badly organized refugee camps. The former mercenaries attacked a police station to get arms, starting a rebellion against the national state. Mano Dayak, who became one of their leaders, exploited his contacts to France through systematic propaganda, spreading the image of a vengeful Tuareg reaction against genocidal oppression perpetrated by a black elite (Salifou, 1993: 161; Dayak, 1996a: 187). Quite successful, this campaign led to broad financial, political and logistic support by France and several European organizations and groups. At the same time, the image of the Tuareg as a 'perishing' culture, which should be protected and preserved, became increasingly dominant in Europe (Friedl, 1992: 8; Grégoire, 1999).

Over time, the rebellion split into more than 15 different fronts, as a result of infighting based on individual interests. Even though there were several initiatives for a common peace treaty, none of them were supported by the rival factions. In this situation the rural Tuareg population suffered the most, as they were harassed by both the national army and by the rebels. By the middle of the 1990s, their support for the rebels had waned considerably. This new situation forced the different fighting fronts to accept a common peace treaty, which was signed in 1997. This treaty promised the integration of the rebels into the national security bodies and the naming of a leading rebel chief and former assistant of Mano Dayak, Rhissa ag Boula, as Minister of Tourism. Additionally, it was promised to liberalize the national regulation of the tourism economy.

As soon as the new situation was more or less accepted among the rebels, tourism rapidly turned into the new gold mine, being perceived as a way to make easy money. Equipped with all-terrain vehicles, stolen from development organizations during the rebellion, a fast growing number of former rebels founded their own travel agencies. At the end of the year 1999, some 60 agencies competed for a few hundred clients in Agadez. The main services offered by these agencies were nothing but orientation guiding, driving, cooking and interpreting, as the employees were normally nomads and ex-rebels who had missed out on formal education. Under these circumstances, Mano Dayak's old product package was, by necessity, simply reproduced. Once again, as had been the case a decade before, western 'aliens' were navigated by native coxswains in 'Toyota-UFOs' through the moonscape of the Sahara, far apart from the villages. This time the motive for this approach was not to protect nomads from 'zoo tourism' but to protect visitors from 'annoying' children and beggars, as many chiefs of tour operators in Agadez reported (Friedl, 2005b).

No Way Back for the 'Tuareg Museum'

The region of Agadez was 'discovered' in the late 1990s by two totally different types of tourists: first, the 'classical' Sahara tourist looking for impressive land-

scapes, dunes and other non-cultural attractions and, second, a kind of 'Tuareg fetishist' hoping to get a chance to come into contact with 'real, authentic' Tuareg culture.

The latter type of Agadez tourist more often travels alone rather than in groups and with tour operators. Some of these 'hardcore Tuareg fans' even start a part-time-life in Agadez, financed by activities as consultants for development organizations, as multilingual tour guides or by creating their own tour agencies, even though this is illegal for foreigners. The main success of the latter in competition with local agencies is based on their strategy of controlling and manipulating information about the Tuareg, the security situation and other facts important for potential clients from Europe. This is one of the reasons why the image of the 'endangered Tuareg culture' is still alive and well: it is part of the Tuareg myth which brings quite a lot of postmodern Europeans to the Sahara in the search for a better world.

The author was invited as a journalist to join a journey to the Aïr Mountains by an Austrian Tuareg expert in the year 1997. The trip also provided an opportunity to collect information about the condition of the population after the Tuareg rebellion for newspapers and magazines (Friedl, 1998). The programme of this journey had promised a visit to the village of Timia in the heart of the Aïr Mountains. However, this did not happen. The group of Austrian travellers passed Timia without stopping. This omission was explained by the tour guide, an Austrian female hardcore Tuareg fan living in Agadez, as an effort to prevent the intimacy of the village from being disrupted by tourists.

At that time, the author was quite impressed by this apparently sensible and thoughtful position, which finally led to the decision to start a long-term research project about the ethical justification of tourism development in a nomad region. This study, which was conducted between 1999 and 2004, demonstrated that the view expressed by the Austrian tour guide did not correspond in the least to the current wishes, needs and constraints of the Kel Timia. None of the 54 members of the local population interviewed, whether goat herders, blacksmiths, politicians, students or school directors, argued against participation in tourism in order to preserve local culture or provide isolation from tour operators (Friedl, 2004).

In fact, tourism means a great deal to the Kel Timia. From tourism, they expect to benefit both materially and in the realm of ideas by selling handicrafts and groceries, providing entertainment, and engaging in discussions and building and sustaining contacts to Europe. A very important aspect of their image of tourism is their expectations regarding its long-term benefits. From the point of view of the Kel Timia, former visitors will return with material help and even with development projects to support the village. According to their view, though, 'tourists' would finally become 'foreigners'. For a Kel Timia, a 'tourist' is somebody who 'travels just for fun, buys a lot of things, takes photographs and who is always in a hurry'. In contrast to a 'tourist', a 'foreigner' is perceived as a person who comes for a 'serious' purpose like development or research projects, and who 'takes his time and listens to the people'. To support the transformation of a tourist into a foreigner who will return to Timia with a profitable develop-ment project, the Kel Timia believe it is necessary to raise the visitor's level of enthusiasm about the village and its population by creating an emotional bond

between them. That is why, following the 'psycho-logic' of the Kel Timia, they try to impress tourists with fascinating Tuareg festivals and folklore. Tourists take a lot of photographs of these spectacular events. These events are perceived by the Kel Timia as the 'best promotion' they can get for their village and their people.

Through this strategy, the Kel Timia do not want to maximize the number of visitors as a priority but to maximize the length of their stay. The longer visitors stay in Timia, the more they have the chance to see and buy some of the local crafts, and the more they become practically and emotionally involved in the affairs of the locals, thus becoming attached and moving from the role of a distanced hurried tourist to a patient, intimate foreigner. The final aim of this strategy is to make a visitor come back again to visit 'his' Timia – and to 'save' it.

In fact, there is a lot to save in Timia. In the last 30 years, the population has increased sixfold, but there has been mean reduction of 30% in rainfall. Droughts have become much more frequent. These droughts are devastating the pastures, which is the reason why more and more nomads have begun to practice horticulture. But there are also limits for that, as both fertile soil as well as water are becoming scarcer. Another severe drought would force many Kel Timia to face the choice between looking for a job as an illegal, unskilled worker in Libya and finding a place in the slums of Agadez or some mega cities in West Africa.

One of the main problems the Tuareg are increasingly confronted with is desertification (Hammer, 2000). This is the expansion of infertile soil, caused by clearing, overuse and erosion. In the Sahara alone, thousands of acres of fertile soil are lost every year through desertification. The growing population accelerates this process, as more people need more pastures, more soil for farming, more food, more water and more firewood. The soil is becoming increasingly overused. Finally, unemployment and poverty force people to cut wood as the ultimate means of earning money to feed their families. But cutting wood reinforces erosion. A new factor of desertification is climate change, resulting in more frequent climatic extremes like droughts, thunderstorms and floods, natural phenomena which all support the process of desertification.

This situation is creating a huge dilemma for the Kel Timia's plans for tourism: on the one hand, tourism offers new opportunities for employment and income which do not deplete the soil; on the other hand, tourists come to Niger by plane, and the planes' emissions significantly contribute to the slow and silent destruction of their environment through climate change.

The Kel Timia have a clear answer to all of this: they have to live in the here and now; they have to feed their children now, and they can't think about what might happen in 50 years. Their solution for the complex problems they face today is always the same: 'we need a project!' ('il faut un projet!').

The 'White Rescuer'

This Tuareg point of view is a consequence of their experience. Their first 'rescuer' was the German ethnologist Gerd Spittler, who experienced first hand the impact of the long drought in the 1970s, which devastated the village and its

people. In that period, the starving camels were too weak to survive the salt caravan to Bilma. To prevent the Kel Timia's caravan system from collapsing, Spittler started to collect money among his friends in Germany to provide an alternative to the caravan to Bilma by buying salt there and transporting it on trucks. Provided with salt, the Tuareg were able to lead their caravan directly to the more fertile south to feed their animals and to barter salt for millet. Finally, Spittler helped the Kel Timia to maintain their caravan system (Spittler, 1993). In the following years the German development organization gtz ('Deutsche Gesellschaft für Technische Zusammenarbeit') established a significant number of projects in and around Timia.

The biggest success of the Kel Timia in 'converting' a tourist to a 'friend of Timia' was the case of Michel Bellevin from France. He visited Timia in the year 1997 during a tour and recognized that the people of Kel Timia were suffering from drought and isolation. When he returned to France, the retired engineer founded the association 'Les Amis de Timia' (The Friends of Timia). Its explicit aim was – and still is – to bring urgently needed help and to support the development of Timia (Les Amis de Timia, 2006). The first activities of the Association were creating a stock of provisions to deal with any eventual new emergencies, providing support for the farmers and nomads and improving health and education services, feeding malnourished children, as well as maintaining the Tuareg culture by subsidizing the caravans.

Those activities gained strong momentum as they were increasingly expanded and professionalized. The projects became better adapted to the needs of the population, and Bellevin and his team took more and more into account the problem of the inner conflicts of the Kel Timia, as well as conflicts with the population around the village and with the partner villages that joined the programme. Reports and evaluations became standard procedure; the same applied to the group's public relations activities and charity events. In the meantime, 'Les Amis de Timia' has developed from the ambitious initiative of an emotionally affected tourist to a professional, serious organization with more than 250 members. The activities are financed by its members, subsidies from French public institutions, sponsors, public events, sales of Timia handicrafts, and so on. To motivate people living in France to attend the group's public events, to buy Timian goods and otherwise demonstrate solidarity by supporting the project financially, performances of 'real' Kel Timia in their traditional outfits have been adopted as a common marketing strategy by 'Les Amis de Timia'.

In the year 2002, this commitment was made even more sustainable through the establishment of an official partnership between Timia and Louvrier, the home town of Michel Bellevin. Since that time, an increasing number of people from the region around Timia have benefited from the activities of the organization. Currently, scholarships are also being provided to pupils and students of Timia. The construction of a high school and a small hospital, as well as the development of a regional social insurance system, are the next bigger projects for Timia.

Tourism as a Path to 'Global Mercy'?

The impressive projects outlined above are an outgrowth of a very intense emotional relationship between the western 'helpers' and the village and are an expression of the 'foreigner's' love for Timia. For example, the ethnologist Gerd Spittler who lived for several years in Timia, at one point even thought of settling there permanently, marrying a local woman and becoming a Kel Timia himself. He had the desire to protect 'his Timia-World' from any western influences. This explains why he never received visitors from Europe in Timia itself, but always met them somewhere 'outside' (Spittler, 1998: 54).

A similar observation has been made regarding Michel Bellevin. In the first years of his activities in Timia, he was very critical of tourist activities in Timia and preferred not to speak publicly about his activities. He was also not interested in the author's analysis and recommendations with respect to the planning and development of tourism in Timia. His behaviour created the impression that he was afraid of losing his monopoly status as a 'merciful' helper if others became involved independent of his organization.

Phenomena like those of Gerd Spittler and Michel Bellevin are easy to find in Agadez nowadays. Most of the 'development projects' there are individual initiatives, established by non-governmental organizations or private individuals supplying food, money or other goods. A typical characteristic of most of these initiatives is that they almost always begin with a tourist trip which permits enough time and opportunities for intensive emotional encounters. Schmidbauer (2002), a social services expert, has shown that there is a significant correlation between helping activities, affection and dependency between the 'strong' helping and the 'weak' helped person.

There are many possible explanations for this phenomenon. Ulrich Beck's (1997: 119) concept of a 'global mercy' on the part of postmodern European society, for example, attempts to explain it in terms of what Beck (1997: 129) calls 'a polygamy of locality' ('ortspolygam'). Beck asserts that Europeans are seeking substitutes for their traditional structures, which are collapsing as a result of the decrease in stable relationships. Consequently, individuals lack an appropriate 'projection screen' for long-lasting emotional 'investments'. The liberalization of the economy, the frequent change of workplace and residence increasingly constrain relationships. The increasing destabilization of both professional and private life is followed by destabilization of values and views of life. In the end it appears that postmodern individuals have become nomads in their quest for economic, religious and emotional resources, and they pay for it with time. The more mobile they are, the more they are 'on the move' and the more often they have to adapt themselves to new circumstances and contexts, the less time they have to stay put. They are not in a position to make the investments of time necessary to become truly intimate with others, an indispensable condition for long-lasting and satisfying relationships.

The escape route out of this time-familiarity dilemma of postmodern relationships seems to be in modifying the common paradigm of a 'good relation-ship'. By giving up the paradigm of mutual confidence that the partner will be 'true' or 'authentic' and replacing it with a new paradigm emphasizing the best

possible coordination of the partners' mutual expectations and reactions during the short duration that they are together, the chance for longer lasting partnerships within an increasingly mobile society can be maximized. This approach to postmodern relationships in a time of increasing mobility may be characterized as the 'mobile relationships paradigm'.

Based on this paradigm, the people in the south can maximize their chances of acquiring a 'project' or other form of western support to secure their basic needs by:

1. Playing the role of the 'bon sauvage' who seems to be facing 'banishment from paradise'.
2. Appealing to Europeans who are looking for the 'bon sauvage' and are willing to 'save' him.
3. Confirming Europeans in their conviction that they can constructively and sustainably support the 'bon sauvage' in their fight for a 'dignified life' and against 'poverty and calamity'.
4. Encouraging Europeans to initiate new projects and/or support existing ones and, finally,
5. Confirming their impression, that in return for this mercy, strong bonds of 'true' and 'long-lasting' friendship as well as thankfulness will emerge between them.

The apparent contradiction between the image of 'true' friendship on the one hand and the expectation of thankfulness on the other may appear to pose a problem, however. But this apparent contradiction disappears as soon as this relationship is evaluated on the basis of the mobile relationships paradigm. In the new 'economy of simultaneous solidarity and charity', there is neither time to clear up misconceptions nor for disillusioning expectations and projections.

A tourist simply doesn't have the time to reflect and 'really' to understand the way a Tuareg nomad 'really' thinks and feels. Human beings are fundamentally biological, constrained in their instruments of perception and construction of reality. This is because of the limitations placed on us by our senses and, specifically, the brain as the basis of the self-referential structure of 'understanding' (Glasersfeld, 1997; Watzlawick *et al.*, 2000; Foerster, 2002; Roth, 2003). Nobody can ever 'really' understand what anybody else 'really' thinks or feels. After all, a tourist isn't looking for 'real' things anyway. He just wants to see his clichés confirmed.

In this respect, for the people of Kel Timia as well as for the 'merciful' visitor, it is important how well they both play their roles in the 'theatre of friendship'. This could be compared with the ritual of a postmodern weekend relationship: both partners try to profit from their shared time together in the best way possible by playing their specific part as best they can. By doing so, they in return maximize their chances of getting their emotional needs satisfied by their partner. To ensure that the intentions of this ritual are fulfilled, both partners have to avoid involvement in everyday troubles. These problems are reserved for 'normal' times without this 'special' partner. By contrast, these 'special' times are there to fulfil 'special' emotional needs, so the intrusions of everyday life should not be allowed.

This phenomenon has been already observed by the American sociologist Cleo Odzer (1994) while studying prostitution in a tourist destination in

Thailand. Odzer was able to show that most of the prostitutes came from the far north-east of Thailand, where the social position of women was very low. By leaving their villages to work as prostitutes in the tourism centres in Bangkok, the women were able to earn enough money to support their families financially. Thus, they were able to gain much more prestige among their family members by staying personally independent, which would be absolutely unimaginable for middle-class Thai women. To maximize their income and to make their working conditions as pleasant as possible, the prostitutes tried to suggest that their 'clients' enter into a 'romantic' relationship with them, with 'real romantic' feelings of attachment, instead of having just a simple exchange of money and sex. Through this strategy, the girls tried to convince their clients to support their 'beloved girlfriend' with additional benefits like gifts, money or even marriage. As soon as a client tried to convince the 'girlfriend' to give up her job as a prostitute to take on some other 'morally clean' job at lower wages, without at the same time giving her a promise of marriage, the women immediately broke off their 'business connection' to look for another client who was willing to fulfil the role of a 'romantic' and supportive partner. Already Cohen (1986: 115) discussed this specific relationship of Thai bar girls with their customers, describing it as 'a complex mixture of sentimental attachment and pecuniary interest on the girl's part'. To maximize their income or other forms of benefits, they seem to practice a kind of experience management by creating an atmosphere of friendship and intimacy to satisfy the emotional needs of their clients.

Leed (1993: 136) argues that prostitution should not merely be seen as a pure and simple exchange of sex for money, but as a sexualized form of commercial exchange between locals and travellers. This was quite common in several traditional societies that lived on trade and so were dependent on travellers. This model of exchange can be adapted to modern tourism where customers are looking for unique emotional experiences instead of sex. Herdin and Luger (2001: 17) report on Austrian tourist communities in the mountains that enter into special types of relationships with special guests, especially frequent visitors, by providing specific emotional satisfaction. To maintain the attachment of these guests to their hosts, they allow them to participate in the host's 'real life' to create a certain feeling of authentic intimacy. According to Vester (2005: 26), referring to Goffman's model of interaction (1982), those hosts permit their special guests to move behind the curtain of the 'holiday theatre'. When it comes down to it, however, the hosts are playing a perfect role to get what they want: cash money for (well-staged) cosiness.

In the case of the people of Kel Timia, western 'exoticists' do not expect 'cosiness' or even 'sex', but the fulfilment of their illusion of simplicity, stability and lasting nature of the 'good old times' which have been lost in the western postmodern world. They look for the feeling of being a 'real part of them' by securing the privilege of looking behind the curtain of the 'holiday theatre'. Precisely because 'globalization' is perceived by those guests as a threat to the 'Tuareg world', help in the name of solidarity and mercy is interpreted as a way to save this 'Tuareg world'. This 'Tuareg world' ultimately represents their own image of the 'last paradise'. That is why their support of Timia and the 'Tuareg world' for

them means saving the habitat of their own deeply-felt desires. In this way, the Kel Timia are fulfilling the emotional needs of their guests by playing the role of close, exotic friends who remunerate solidarity with long-lasting, 'true' friendships.

Tour Guides: Catalysts of Solidarity?

The 'holiday theatre' of guests from Hamburg and hosts from Tyrol may already be a well-rehearsed ritual. But in the 'theatre' of Europeans and Tuareg nomads, there are still many problems in the arrangement. Missing language ability, xenophobia, the tendency of tourists to avoid contact and, finally, the structure of travel programmes, are important factors in the Sahara trips which often prevent the minimum of contact necessary for any encounter to develop into a mutually satisfying communication process. Trekking trips to the village of the local tour guide are, on the other hand, excellent ways to establish this level of contact. In such situations, the local tour guide is in a mediating position to help both hosts and guests to overcome their timidity. In order to successfully reach this point, schools could be visited where tourists and children can come into informal contact with each other by singing songs, cracking jokes, telling stories, etc. Observations of such situations demonstrate their enormous potential to create an atmosphere of positive interaction allowing emotionally intense experiences.

This process of bringing together persons of different cultures to develop a long-lasting relationship based on an exchange of emotional feedback for material help is certainly a tightrope walk. Nobody can enforce such a process of mutually satisfying communication. In fact, every action taken to support such a process has to be adapted to the specific culture of the 'environmental bubble' by both the tourist groups and the hosts. Finally, it has to be accepted if some tourists prefer walking on the dunes and watching the sunset instead of walking into villages to talk to locals.

The Sustainability of Projects Initiated by Tourists

Sustainability as a measure of the success of projects has become increasingly questionable in the world of expanding mobility and accelerating change. Not only the 'rest of the world', but also the western world increasingly suffers from this change. More and more Europeans are employed in time-limited projects, while jobs for a lifetime have become the exception. Even old institutions like universities have to struggle for financial resources by developing a successful 'culture of project applications'. This global trend raises a number of important questions: have the people in the 'south' become part of this mobilized, postmodern 'project world' where everybody is constrained (or has the chance) to play his own role? What alternatives do the Tuareg from Timia have to assure their survival? Is the alternative of successfully playing the part-time role of the 'amiable and salvageable bon sauvage' for tourists so bad? Is it not finally, in the face of problems like desertification, overpopulation, lack of medical help, and inadequate schools, jobs and infrastructure, an interesting opportunity?

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5

The Influence of Religion on Global and Local Conflict in Tourism: Case Studies in Muslim Countries

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The influence of tourism on changes in local communities is nowadays seen not only in terms of economic profit but also as a cultural problem. Economic and educational benefits are presented as advantages or functions while the disadvantages or dysfunctions are environmental degeneration or threats to the culture (Craik, 1995; Bendel and Font, 2004). Cultural dysfunction is of concern not only to indigenous people but also to visitors. Aggression can manifest itself in small ways (e.g. throwing stones) but also in terrorist attacks (destruction of 'the immorality centre').

Tourists are real proof of the presence of 'an alien' (Podemski, 2004). They bring their own customs and habits to the visited country, are not aware of the cultural shock they cause or they just don't care (Butler and Hinch, 1996; Aparna, 2004). From another viewpoint, tourists are the subjects of judgements which are based not only on cultural reality but also on stereotypes created by the mass media (Cohen, 1984; Przecławski, 1997). This especially pertains to poor countries where images of Europe and the USA are based on TV serials, 'Dynasty'-style soap operas which show a wealthy, idyllic and unreal world. Expectations from the wealthy tourists are too high and cause a lot of bitterness (e.g. the visitor has money but does not want to share it) (Doxey, 1976).

It is no longer surprising that susceptibility to tourism dysfunctions varies between different cultures (Przecławski, 1997; Gursoy and Rutherford, 2004). It depends on the level of social development, education, distribution of income from the tourism industry and many other factors. Undoubtedly one of the major factors is religion (Vukonić, 1996).

One must keep in mind the fact that Islam interacts in a very specific way with other religions *(Global Code of Ethic for Tourism*, 2001). It requires very careful action from a country's government and consideration of social, religious and humanistic conditions – much more so than in the case of EU countries.

Aims

One aim of this work is to single out the factors which cause social and cultural dysfunctions in tourism in selected Islamic countries. The studies put emphasis on those social and cultural dysfunctions which have or could possibly have influence on the development of tourism. Another aim of this work is to determine the influence of governmental activity on the prevention of tourism dysfunctions.

Methodology

The field studies conducted for the purpose of the present work fall into the 'concept of tourism as an encounter of cultures' which originates in the social sciences (Przecławski, 1979; Podemski, 2004). According to this concept, tourism is considered as cultural or civilization contact. Podemski defines the encounter of cultures as a

> relationship which comes into being between various groups or societies which differ from one another in civilization that usually causes conflicts, shocks (clashes) or changes in some or all spheres of civilization remaining in interaction (Podemski, 2004).

Notions such as cultural shock and cultural conflict are used here (Podemski, 2004).

According to Przecławski (1979), tourism leads to numerous transformations both in the place visited by tourists and in the personality of tourists themselves. Therefore changes are bilateral and depend on three main factors:

- The cultural background of the hosts – the type of culture of the community receiving guests. Przecławski names such components as type of culture, type of reception and the type of reception policy.
- The cultural background of tourists – i.e. the type of culture of the community where visitors originate. Such factors as age, sex, education, income, profession, nationality, motives for travelling and type of policy concerning outbound tourism are of great importance.
- Encounter – cultures coming into contact (the form, freedom, place and scope of the contact of cultures is important).

An important factor is also time, i.e. the durability of the influence, understood not as the duration of the stay in a given village of one tourist but for how long tourists have been visiting a village 'in general', i.e. the intensity and timespan of the tourist season (Davies, 2003).

The information used in this work comes from field studies performed in the United Arab Emirates in May 2004, in Kenya in July/August 2004 (three research areas: Mombasa, Watamu and Lamu Island), in Palawan Island (The Philippines) in October/November 2004, and in Tunisia in September 2002.

In the study, the methodology and research tools of cultural anthropology (i.e. Sztumski, 1984; Spradley, 1980; Jorgensen, 1989; Phillimore and Godson,

2004) commonly used for cultural identity research in Asia and Africa (Cole, 2004a,b; Arlt, 2006) were used. During the field studies such research tools as direct participating observation (Jorgensen, 1989), indirect participating observation, questionnaire interviews (uncategorized questionnaire, overt and covert questionnaire, individual questionnaire) were applied (Sztumski, 1984; Dann *et al.*, 1998; Davies, 2003).

According to the methodological guidelines, the questionnaire interviews were oral, overt, individual and encompassed numerous complementary questions (Sztumski, 1984). The results of the study are not of a quantitative but of a qualitative character (Dann *et al.*, 1998; Mason, 2000).

While sociological tools (forms, statistical analysis, *etc*.) provide quantitative information, the tools of the Chicago School are indispensable in qualitative analyses. The qualitative methods bring the best results in research on taboo issues and behaviours, which the researched group of people is not necessarily aware of. In the author's opinion one of the taboo issues is religion, which is treated by Muslims very emotionally (many behaviours rooted in religion cannot be easily and logically explained by the believers basing their explanations only on the knowledge of the doctrine).

The choices of Tunisia, Dubai, Kenya and Palawan (The Philippines) provide a diverse spread in terms of geographical location, cultural background, the education level of the indigenous people, the income level of the indigenous people and the types of tourism which can be observed there, as well as the origins of the tourists who visit those places.

Field studies in each country covered three target groups:

1. Native population – minimum 50 people per country.
2. Foreigners who live there permanently (mostly hotel managers) – minimum 12 people.
3. Tourists – minimum 50 people per researched country (except Palawan Island).

The native population was asked research questions, *e.g.*:

- Are they glad that tourists visit their country?
- Do they see any possibilities to profit from tourism for themselves?
- Do they consider some of the tourists' behaviours as annoying? Which and why? Tourists from which country are the most annoying? Why?

The foreigners who live in the area permanently were asked questions, *e.g.*:

- How do they feel about the indigenous people and their attitude towards tourists?
- What do they think about the tourists' behaviour?

The information received from this group provided comparative data. It concerned the period before and after 2001 and the war in Iraq.

The tourists were also asked questions, *e.g.*:

- What was the reason for coming to the country?
- What were their fears about coming to the country?
- How do they feel about the native population?
- What was their knowledge about local norms and behaviours?

Research Findings and Discussion

Tunisia

Background
Tunisia is a country where tourism is developing probably faster and more intensively than anywhere else in the world (Dziubinski, 1994). 16.5% (501,356 people) of the total number of employed people work in the tourism sector. This sector generates 17.7% of the gross domestic product (GDP). The gross national product (GNP) amounts to US$3000 per capita (WTTC, data as collected by 2006).

Only a few regions are enjoying intensive tourism development (Table 5.1). In some cases we observe a touristic monism, where a regional economy is entirely dependent on the touristic circulation (Grissa, 1991; Mzabi, 1994). The interpretation of the available statistics poses certain difficulties. There is no accordance between the touristic regions set by the Ministry of Tourism and Handicraft and the

Table 5.1. Tourists' visits divided according to region.

Region	2000	2001	2002	Change in %
Tunis-Zaghouan	214,755	211,232	205,464	−2.7
%	20.8	19.7	17.3	
Nabeul-Hammamet	169,191	177,596	196,148	+10.4
%	16.4	16.6	16.5	
Sousse-Kairouan	138,120	177,596	165,810	+17.0
%	13.4	13.2	13.9	
Yasmine-Hammamet	43,122	61,048	99,757	+63.9
%	4.2	5.7	8.4	
Monastir-Skanes	37,042	40,185	44,118	+9.8
%	3.6	3.7	3.7	
Mahdia-Sfax	103,891	106,024	134,365	+26.7
%	10.1	9.9	11.3	
Jerba-Zarzis-Gabes	137,009	133,490	147,337	+10.4
%	13.3	12.5	12.4	
Gafsa-Tozeur	88,575	94,088	84,388	−10.3
%	8.6	8.8	7.1	
Sbeitla-Kasserine	9,707	11,012	10,647	−3.3
%	0.9	1.0	0.9	
Bizerte-Beja	21,170	22,890	24,131	+5.4
%	2.1	2.1	2.0	
Tabarka-Ain Draham	67,984	72,262	78,553	+8.7
%	6.6	6.7	6.6	
In total	1,030,566	1,071,601	1,190,715	+11.1
	100	100	100	

Source: Le tourisme tunisien en chiffres, 2002; Office National du Tourisme Tunisien.

official administrative division of Tunisia. The implemented division does not correspond with the natural conditions, the landscape (e.g. the coast, desert, etc.), the social conditions or even historical traditions of Tunisia, not to mention the types of touristic circulation.

Research findings

The interviewed indigenous people did not criticize the behaviour of tourists inside the resorts, even if the behaviour did not comply with Koran instructions (drinking alcohol, the occurrence of casinos, licentiousness). Only the behaviour which was 'conspicuous' for people not connected with tourism and performed outside the resorts was criticized (see also Smaoui, 1979; Dłużewska, 1998).

Indigenous people mentioned many 'delicate matters' in tourists' behaviour: the lack of interest in bargaining (considered as arrogance), lack of interest in entering into a conversation, cheating, withdrawing from negotiations without honor, etc. Behaviour which violates the religious rules, however, was considered most annoying (for example male-female relations or women wearing daring outfits when leaving their hotel, even though the surrounding villages are known to be conservative). Such behaviour was perceived as an insult to Allah. The interviewees' complaints in this case were mostly addressed to Germans and Russians (whereas Russians constitute scarcely 1.6% of Tunisian tourists, Germans amounting to 9.5% are markedly visible).

The licentiousness of tourists has been confirmed in interviews conducted among a group of foreigners living permanently in Tunisia (although some of them – mostly citizens of the former USSR – have broken cultural norms to the same extent as tourists) as well as during the participating and non-participating field observation.

The tourists questioned did not realize that they were breaking cultural norms in a drastic way, although some were aggressive, claiming: 'I pay, so I have the right to behave as I please'. Such answers were given especially in the case of tourists from Germany (see also Dłużewska, 2005a).

Discussion

In Tunisia family tourism predominates. Tourists are looking for beach and sun holidays. The predominant tourism type is reflected in the character of the so called 'potential tourist' and translates into functions and dysfunctions of tourism (Poirier, 1997a, b; Dłużewska, 1998; 2007a, b).

Most of the tourists who visited Tunisia in 2004 were European (58%), including the French (17%), the Germans (9.5%), the Italians (7.5%) and the English (5%). A strong increase in the number of tourists from other Arabic countries who visit Tunisia (40%) was observed, e.g. tourists from Libya (23%) and Algeria (15.3%).

Visitors' attitude and the attitude of indigenous people towards tourism provoke dysfunction which is sociocultural in background. The tourists' behaviour depends greatly on their country of origin (Dłużewska, 2006). Tourists from Arabian countries where the same religion is followed do not cause cultural dysfunctions. Such a great percentage of tourists from Muslim countries is certainly a huge advantage for Tunisia.

The most important social and cultural dysfunctions in Tunisia are connected with religion (Poirier and Wright, 1993; Poirier, 1994). The Tunisian government protects tourists against attacks by Tunisians, yet it does not undertake any action in order to 'protect' its own citizens against the culture shock caused by tourists. No position has yet been worked out that would enable the government to react in such a way that it could prevent itself from being accused of sympathizing with fundamentalists and 'scaring off tourists'.

Dubai (United Arab Emirates)

Background

The United Arab Emirate's travel and tourism economy (direct and indirect impact) in 2005 is expected to account for 12.5% of GDP and 183,576 jobs (12.4% of total employment) (WTTC data as collected by 2006). In practice, the tourism industry shown on average for all Emirates is mostly generated by Dubai, which has a surface of 3885 km^2 and 1.04 million inhabitants.

The history of economic growth in Dubai is the history of a single generation. The tourism investment boom began in 1994–1996 and it reached as much as 35% of all investments in the United Arab Emirates (Davidson, 2005; Grant *et al.*, 2007). Nowadays it amounts for 28% and this index is the highest of all Middle East countries (Government of Dubai. Department of Economic Development Official web site; World Travel and Tourism Council, undated).

Dubai has the richest tourism infrastructure of all Middle East countries: the most luxurious chain hotels, conference and shopping centres, etc. The international airport operates very efficiently, also being a very important transit place for travel to the Far East. Tourist attractions are nevertheless mainly created by special investments, which not only serve tourists but become tourist attractions on their own (Dłużewska, 2004; Lee, 2005). A good example is the seven-star hotel (the first one in the world), Burj Al Arab, which belongs to the local chain The Jumeirah.[1]

After the 11th September 2001, in order to start to reverse the decline in tourism, the Tourism Department of Dubai shifted promotion of tourism to the countries where people are less afraid of acts of aggression from Muslims (compared to citizens of the USA and the UK). Due to such changes, American tourists were replaced by less demanding but very rich tourists from the former USSR (Dłużewska, 2005b; 2007a, b). Therefore, the tourist industry in Dubai underwent only a slight and short-lasting recession (Table 5.2).

Research findings

The interviewed indigenous people mentioned that some behaviours, such as lack of a sense of humour and breaking off business negotiations, were considered annoying yet caused little harm. It was 'promiscuity' manifesting itself in uncovering the body in public places which was most criticized. Behaviour such as visiting cities wearing a bikini or briefs and showing each other erotic affection in public places were considered as being an affront to indigenous peoples' dignity and – what is even worse – an offence to Allah himself. According to the opinion

Table 5.2. Incoming tourism in Dubai (tourists staying in hotels).

	2000	2001	Change in %
Other Emirates (UAE)	96,244	93,709	−2.63
Other countries AGCC	168,493	176,334	4.65
Other Arab countries	71,056	68,791	−3.19
Asia	123,502	113,576	−8.04
Australia and Pacific	2,760	3,372	22.17
Africa (except Arab countries)	13,581	19,136	40.90
Europe	94,606	71,970	−23.93
S and N America	14,329	15,036	4.93
Total	584,571	561,924	−3.87

Source: DTCM

of the native people these behaviours offended God, so they should qualify as dysfunctions of religious origin. The interviewees expressed these opinions mostly towards the behaviour of tourists from the former USSR.

The interviewed foreigners – predominantly hotel managers – expressed severe criticism towards tourists from the former USSR republics. They stressed that this group showed a total lack of cultural respect.

The interviewed tourists had a very diverse knowledge on the cultural norms of the United Arab Emirates. A relatively high level of knowledge was observed among tourists from countries such as France, Great Britain, USA, India and Germany. A lack of knowledge was observed among tourists from the former USSR. Some interviewees claimed that the author tried to create problems that did not exist in reality – if, in their opinion, real objections existed, e.g. against wearing a bikini in the city centre, they would have been informed by someone.

Discussion

The government of Dubai has guaranteed by law that 51% of each property in the Emirates (hotels, car showrooms, shops, restaurants and others) has to belong to a citizen of the United Arab Emirates[2]. Dubai is a 'foreigners' country' – foreigners constitute on average 80% of all residents. The residence permit is admitted to people who have a valid employment contract, it is verified every 2 years and it expires by the end of the contract, even for people born in the United Arab Emirates (The Official Portal of Dubai Government; Employment, Business; Dłużewska, 2005b; 2007a, b). After having reached retirement age, that is 65 years old, foreign employees are obliged to return to the countries they came from.[3] The obligation put on foreigners to actively work in their profession is undoubtedly a barrier for classical immigration and immigration-related problems: cultural differences, unemployment, insurance and benefit problems, etc. (Clements 1998).

The visa system is very restrictive. A visa can be received by tourists (a voucher from the travel agency is required) and people who received an invitation from the President of the United Arab Emirates (The Official Portal of Dubai Government; Visitors).

The Government of Dubai invests in the cultivation of the country's culture: housing estates are built in the architectural style of traditional buildings and numerous centres for culture are built. Hatta Heritage Village – a specific open-air ethnographic museum on the history and culture of the Emirates – can serve as an example. Although such places were created for the indigenous population with the aim of cultivating tradition, they are also a great tourist attraction.

The government of Dubai applies a preference remuneration system for its citizens. If a United Arab Emirates citizen decides to take a job in a position usually occupied by foreigners (e.g. in a bank) his or her salary is on average four times higher. The governmental activity in the economic and financial as well as organizational, legal, demographic and technological field is definitely positive and supportive. No dysfunctions in tourism have been observed here.

Dysfunctions in tourism in Dubai are dysfunctions of social and cultural character (see also Henderson, 2006). Studies confirm that the level of dysfunction is inversely proportional to the level of knowledge on the culture of the visited area possessed by tourists and the respect for its social norms resulting from that knowledge (Craik, 1995). The level is indirectly connected to the type of tourism [e.g. mass tourism participants are usually poorly educated (Ghimire, 2001)]. As a result, mass tourism causes more dysfunctions than backpacking or exclusive tourism (Dłużewska, 2005b; 2007a, b, d).

The studies on the UAE prove that in the case of exclusive tourism, some dysfunctions which are typical for mass tourism may occur. The behaviour of the citizens of the former USSR, especially, can be considered as typical for mass tourism and not for the exclusive tourism in which they actually take part. The behaviour of tourists depends also on their country of origin. Tourists from Arabic countries, where Islam is universally followed, do not cause cultural dysfunctions. The fact that Muslim tourists constitute a significant percentage of all incoming visitors is highly positive for Dubai.

The range of nationalities of visitors can lead to some intercultural confrontations. The behaviour of the citizens of the former USSR is much more free and easy compared with the behaviour of other Europeans or Americans who are more accustomed to different cultures (Dłużewska, 2005b). Very frequently, these newer tourists dress too scantily and often one can see a bikini in the centre of the city (because it is hot…). The government of Dubai does not react yet – it is afraid of being accused of fundamentalism and does not want to 'frighten tourists'. However, total ignorance can lead to aggression from native citizens or very conservative incomers from neighbouring Oman.

The most important social and cultural dysfunctions in Dubai are connected with religion.

Kenya

Background
The tourism industry in Kenya in 2004 constituted of 12.2% of GDP and employed 547,959 people (9.9% of the country's working population). According to the World Travel & Tourism Council (WTTC) forecast, employment in tourism will grow 4.3 % annually until the year 2015.

A significant percentage of the visitors are tourists who spend their time actively, appreciate contact with nature and look for the so-called 'African adventure' (Sindiga, 2000; Bruner, 2001; Kieti and Akama, 2005). The second group is composed of people who respond to cheap offers of travel agencies, have their rest on the coast and for whom the main point is not the actual beauty of the Kenyan coast but the exotic name and the possibility of boasting in front of their friends (Middletown, 2004). This trend can also be observed in the statistics (Table 5.3).

In the Christian part of the country, the active and qualified type of tourism dominates and therefore it can cause social dysfunctions only in a very limited way (Ondimu, 2002). On the other hand, the relaxation, beach-type of tourism dominates at the seaside which is inhabited by Muslims (Abuodha, 1991; Sindiga, 1996; Jamison, 1999; Dłużewska, 2007c).

Research findings

The interviewed indigenous people criticized such tourist behaviour as a 'reluctance to share with poorer brothers' which was by some indigenous people associated with 'racism', a patronizing attitude, nervousness, etc. However, significant differentiation among answers with regard to the education level, age and financial status of respondents could be observed. People who were better educated tended to criticize the behaviour of tourists in hotels (behaviours invisible to the outsiders), e.g. the possibility itself of wearing a bikini and staying in the swimming pool with both men and women at the same time, the availability of alcohol, etc. This kind of behaviour was considered unacceptable and 'offensive towards Allah'.

Foreigners living in Kenya (mostly cooperators) stressed the significant growth of aggressive fundamentalist attitudes after the American intervention in Iraq. According to two interviewed groups these attitudes became particularly visible among rich citizens of Kenya and among children and youths attending schools. This information was confirmed during the field observation. Young people attending schools usually had a truculent and aggressive attitude towards the author, which definitely contrasted with the kind of behaviour of their peers not attending schools and elderly people.

Tourists who come to visit Kenya – although most of them were not aware of the existence of Islam at the Kenyan seaside – usually show respect towards local

Table 5.3. Visitor arrivals (000s) by purpose of visit, 1999–2004.

Purpose	1999	2000	2001	2002	2003	2004*
Holiday	746.9	778.2	728.8	732.6	684.0	885.6
Business	94.4	98.3	92.1	86.6	182.1	246.4
Transit	107.4	138.5	152.6	163.3	219.0	162.2
Other	20.6	21.5	20.1	19.0	61.0	66.5
Total	969.3	1036.5	993.6	1001.3	1146.2	1360.7

*Provisional.
Source: Kenya Tourism Board web site (22 June 2006).

customs (including dressing and behaviour customs). The 'dress code' containing information on what to wear while visiting local villages commonly announced in hotels was a block on 'spreading licentiousness' beyond resort areas.

Discussion

Bearing in mind Muslim restrictions concerning proper dress, one can understand that the occurrence of such tourism can be a natural source of social dysfunction. Nevertheless, we are not talking here about mass tourism which is quite primitive when it is in touch with an alien culture. Here, tourists do not expose naked bodies beyond the terrain of the hotels and do not behave ostentatiously. Nevertheless, the negative attitude towards visitors in the Muslim regions recently clearly intensified. In the author's opinion this is caused not by tourists but rather by a conglomerate of other factors, such as mass media and education (see also Peake, 1989).

The reluctance clearly intensified due to the current international socio-political situation (especially due to the war in Iraq) and seemed to drive out traditional Muslim hospitality towards all newcomers. The aliens, unfaithful ones, are gradually excluded from this hospitality.

Perhaps because of the high number of television transmissions from Iraq, the wealthiest citizens of Kenya (having access to CNN) have started wearing the hijab, which substitutes for traditional dress (Fuglesang, 1994; Schoss, 1996). Radical ideas are preached without any limitations in Kenya. A call for Djihad emitted from loudspeakers in market places is commonly heard, and families receive donations if women wear chador. In poor societies financial help is a convincing argument for conversion to a conservative Islam (Sharpley, 1986). Drivers working in public transportation play cassettes with fragments of the Koran (most often Djihad), sometimes for money.

In Kenyan schools, including those receiving financial help from international organizations, teaching contents are not censored and religious hatred is not eliminated. In most schools children must wear hijabs and chadors, which are a part of a girl's school uniform.

Palawan (Philippines)

Background

The Palawan region is situated 586 km from Manila, between Mindoro in the north and Borneo in the south. It is about 425 km long and 40 km wide. Its population is about 737,000 (National Statistic Survey, 2000) of which 18% are cultural minorities (Anderson, 1994). Palawan's inhabitants are 50% Christian (the north of the island) and 50% Muslim. The geographical conditions, infrastructure and tendency towards given types of tourism are the same in both parts of the islands (Salta, 1974). Only religion is different. Therefore the island is an ideal place for conducting research on the connections between religious background and the development of tourism.

The Palawan island is suitable for a variety of active tourism (diving, trekking, hiking, cycling, kayaking and others) and recreation.

Research findings

No indigenous people noticed irritating negative features of tourists. The inhabitants of El Nido complained about a considerable decrease in touristic circulation – they pointed to the attacks in Puerto Princessa as a direct cause of this decline. They complained that the tourists do not support them by their presence and visits. The indigenous people feared extremism from the Muslims from the south. Similar information was obtained from the foreigners who live on Palawan Island permanently (El Nido).

The inhabitants of the southern part of the island envied the tourists who visit the north. They could not blame the state, which invests in the infrastructure on the whole island evenly. So the southerners turned their animosity to 'those from the north' whom they suspect of discouraging tourists from visiting the south by telling untrue stories about the other part of the island. There is a lack of consistency in the southerners' ideas of tourism. On the one hand they would like to profit from tourism, while on the other hand they refuse to watch 'undressed bodies', which is impossible to reconcile when we consider diving or beach tourism. Yet no aggressive behaviours have been noticed here.

Foreigners who settled on Palawan did not notice any tourist behaviour which would break local cultural norms. Similarly to tourists, they were afraid of attacks by fundamentalists from other isles.

Tourists, when asked about the reasons for coming to the Palawan Island, mention the landscape (coral reef, maggots, white beaches, etc.) as well as the perfect conditions for relaxation.

Only Muslim extremists are regarded with fear. When asked about the motives for choosing the northern part of the island and not the southern, they rashly argue with Islam. They fear extremism and negative reactions of indigenous people even more in the south. They do not want to feel ill at ease putting on a swimming suit. Only in the latter part of their statement do they mention the differences in touristic infrastructure.

Discussion

The character of the tourism infrastructure in Palawan does not allow mass tourism. The dominant types of tourism are 'exclusive' and 'backpacking' (Dłużewska 2005a; 2007c). Such visitors can cause only minimal social and cultural dysfunctions.

Among the tourists who visit the Palawan Island we may find various nationalities: the Swiss, French, English, American, Japanese, etc. The percentage of Filipino people among the total number of tourists is considerable as well (Table 5.4).

Although the landscapes in the south and the north of the Palawan Island are identical, tourists tend to visit only the north and avoid the southern part. The native population of the north part of Palawan Island has benefited from the huge advantages of tourism, including those people who are not directly connected with the tourism industry, e.g. shopkeepers and tricycle drivers. Because of the character of tourism (e.g. diving, visiting the neighbouring islands), local fishermen

Table 5.4. Travellers in the Palawan region; January–June 2004.

	Foreign travellers	Overseas Filipinos	Domestic travellers	Total 2004	Total 2003
Palawan	22,316	15	89,746	112,077	52,106

Source: Department of Tourism Regional Offices; Tourism Research and Statistics Division, Office of Tourism Development Planning; Department of Tourism (Philippines).

can also earn some money from tourism – for example by rendering their boats accessible to the local travel agencies (Flores, 1992).

Methods employed by the state in the field of prevention of religious and cultural dysfunctions caused by tourism provide, in the opinion of this author, an almost ideal model. This should prevent any actions against foreign visitors in the future (Goda, 1999).

Local tourist guides are trained how to deal with so-called 'minorities' (usually Muslims) (Lambert, 1993). Tourists are informed of the necessity of proper clothing (less scanty) when visiting the Muslim parts of the island. (Bautista, 1994). Tourist guides usually avoid the villages inhabited by tribes which dislike tourists, usually Muslim tribes, situated in the centre of the country. Tourists are told not to divert their routes and enter the aforementioned villages (e.g. when going to Sabang).

However, youth education in schools and the activity of mosque boarding Koranic schools are not subject to state supervision.

Nevertheless, terrorist attacks by people from other Muslim islands, not by inhabitants of this island, do pose a considerable threat (see also Manalo, 2004). Additional danger comes from a lack of any control over teaching in the Koran schools. This makes it easy to pass radical ideas and allows fundamentalism to spread. Despite major government investments in the southern (Muslim) part of the island, the real development of tourism is only in the north (the Christian part). Because of the kidnapping attack by Muslim fighting units in May 2001, the northern part of the island has also experienced a major decline in tourism.

Conclusions

Among the factors which cause dysfunctions originating in tourism, religion is one of the utmost importance, regardless of culture. Religious dysfunctions are most dangerous and not only because they cause a feeling of indignity among local inhabitants. They can also cause aggression towards visitors. Sometimes (e.g. Tunisia, Dubai), aggression is also rooted in frustration which is an effect of tourists' behaviour, sometimes as an effect of religious propaganda which has little to do with the real behaviour of tourists (e.g. Kenya, Palawan).

Islam has a very strong influence on family and social life. Behaviour which is inconsistent with this religion – and which therefore offends Allah – is far away from mosques (Dalacoura, 2003; Jackowski, 2003). Proper behaviour norms are reflected in proper dress codes for both genders, etc. (Zietek and Stachurska, 2004).

The majority of dysfunctions originate from a lack of knowledge and not from bad intentions. Therefore, it would seem like a good idea to develop a proper education programme regarding the cultural environments of countries where tourists come from. Such a campaign should be different in the former USSR than in Western Europe, etc. In any case, it is essential to be knowledgeable about Islamic norms as well as about the cultural background of the tourists' country of origin (Dłużewska, 2005a, b). An information campaign should start in the phase when the image of the country and its promotion policy are being established. Presenting a realistic image, which corresponds with the cultural reality (and the religious reality at the same time) becomes a necessity. Giving up a certain kind of tourism, which causes most social and cultural dysfunctions, and launching a sustainable tourism process, concerned not only with nature but also with local identity, should also be considered.

Muslim *jihad* is one of religion's pillars and is an obligation of every believer (Jackowski, 2003). This is why there is a common consent to fight any symptoms of immorality – the fight against tourism in this case. In Islamic tradition *jihad* means also self-improvement (for example the former president of Tunisia, Habib Bourgiba, interpreted *jihad* as a fight for economic and educational development), nevertheless nowadays *jihad* is usually interpreted as a war with unfaithful ones. In this situation tourists become an easy target, especially when they (intentionally or not) behave in a provocative way.

Endnotes

[1] The business hotel Twin Towers (which was a former symbol of modern architecture in Dubai) and The Jumeirah Beach (beach and security shared with Burj Al Arab).

[2] The exceptions are three specified zones (including Festival City and Palma), where foreigners may possess 100% of property rights. (Internet pages of the Government of Dubai, chapter concerning investment.)

[3] Internet pages of the government of Dubai, chapter concerning labour law.

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6 'Riding' Diversity: Cubans'/*Jineteros'* Uses of 'Nationality-talks' in the Realm of their Informal Encounters with Tourists

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Introduction

A few days after my arrival in Havana, on my first trip to Cuba, I met a Cuban man who subtly approached me as I was having a tea in one of the main squares of the old town. During our conversation, we started a discussion about tourism, and I was quickly impressed by his knowledge of tourists. Indeed, he seemed to use a wide range of clues, which helped him guess the nationality of the visitors who were approaching our table. He explained to me that not only the language, but also the tourists' appearance would shape his judgements. According to him, Italians, for instance, had a particular way of walking, that could easily be decoded, and the same was true for the Spanish, who lifted their feet higher than necessary, looking as if they were crushing cockroaches. At the beginning, I was quite sceptical about the pertinence of these generalizations. Above all, they made me laugh and enjoy my conversation with this man. Nevertheless, as we could tell from the language tourists spoke when they got closer to us, he seemed to get it right in most of the cases. Indeed, his clues seemed to work quite well, and made me understand that I was just a beginner, while he was the expert in these kinds of observations.

An occasional street guide, the man's income would depend partly on these fine observations and decoding of tourists, as any anticipation of their nationality could orient his decision to approach them, as well as his ways of doing it. He preferred to deal with some nationalities, seeing also that (apart from Spanish) he could mainly speak some Italian, French and English, and he told me what he liked or disliked in tourists coming from one or other country – outlining some of the ways in which he would consequently approach them. According to him, Mexicans, for instance, were very distrustful and suspicious, hard to deal with,

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somehow similar to Italians, who didn't want to spend any money, at least at the beginning, and needed to be 'loosened' (*hay que aflojarlos*) by talking.

By spending more time with him in the following weeks and months, I came to appreciate some of the ways in which he caught the tourists' attention. For instance, he regularly established a first connection with Mexican men by jokingly and provocatively addressing them with some 'typically Mexican' course words (*ino mames cabrón!* ['Don't bullshit bastard!'] *ihijo de la chingada!* ['Son of a bitch!']), mimicking their peculiar accent and giving a light-hearted and funny feel to his approach. Furthermore, his recurrent use of nationality as a discursive resource and framing device while interacting with tourists, would also concern 'Cuban' stereotypes and features, as he praised for instance Cubans' sexuality, telling them that every tourist should have a try at 'the Cuban way' of making love.

All these 'nationality-talks' that my Cuban friend was deploying, whether they concerned tourists' or Cubans' attributes, were having a bearing on the development of the encounters he was having with tourists. For instance, they helped him to classify tourists and orient his behaviour towards them, to capture their attention, to infuse familiarity in their relations with him, or to prescribe the attitudes they should adopt. In this chapter, I explore in more detail the uses of this discursive resource – 'nationality-talks' – as it was regularly employed by Cubans/*jineteros* ('tourist-riders')[1] interacting informally with tourists. But before delving deeper into the subject, I will first take a step back and situate these issues within the broader field of research on international tourism.

International tourism is a phenomenon which selectively fosters encounters and exchanges between tourists and members of the visited population. Official policies, regulations and planning, as well as tourism media and promotion, influence the ways in which these interactions occur, as they legitimize and encourage some encounters and exchanges while discouraging and penalizing others. Indeed, tourists' activities and interactions tend to be channelled by the formal tourist industry towards specific places and persons. Nevertheless, many people in tourist destinations operate on the margins of this institutionalized tourist realm, in what might be termed the 'informal tourist sector', 'that arena beyond the effective control of the tourism authorities – street corners, unlicensed guesthouses, cheap cafes, and so on' (Crick, 1992: 136). People active in this unofficial realm often lack training in the formal tourism industry, and do not generally benefit from tourist promotion and advertisement. Therefore, if they want to engage with tourists in profitable ways, they may have to develop their own strategies and tactics.

This chapter focuses on some of these strategies and tactics, as they were deployed by Cubans/*jineteros* in the course of their informal encounters[2] with foreign tourists. Its aim is to show how research on informal encounters can give privileged insights on the multiple ways in which resources are used by people who are struggling to make a better living from tourism-related activities, but are not employed in the formal tourism industry. As other researchers have shown, people operating on the margins of the official tourism realm often build on concrete experiences to develop very pertinent and pragmatic lines of action and understandings of how to deal with tourists (Crick, 1992; Dahles, 1999; Dahles and Bras, 1999; Forshee, 1999b). This kind of 'practical knowledge' –

elaborated more 'on the street' than in formal institutions – together with its uses and manipulations, can become one of the crucial resources of people who lack any 'substantial economic asset' (Crick, 1992: 138), and have little control over other 'first order resources' (Dahles, 1999: 9)[3] – such as the Cubans/*jineteros* considered in this chapter. In order to examine more closely a concrete example of these strategic and tactical uses of 'intangible' resources, I address in this chapter the case of Cubans'/*jineteros'* use of 'nationality-talks' in the course of their informal encounters with tourists.[4]

The notion of 'nationality-talk' is used here as a rather general term, whose contours are purposefully not clearly defined. Indeed, when examining the interactions between Cubans and tourists, the boundaries between what we might refer to as 'nationality', 'national traits/features' and 'stereotypes'– or even between nationality, ethnicity, or what might be called 'culturality' (Abdallah-Pretceille, 1997) – were often blurred and difficult to establish. The notion of 'nationality-talk', while emphasizing the salience of 'nationality' as a widespread and multi-purpose framing device[5] – which could alternatively be applied to people, stereotypes or other 'cultural features' – helps in gathering under the same umbrella all these slightly different categories, without posing an *a priori* distinction between terms and expressions which often remained vague and unsettled. Furthermore, these ambiguities should not jeopardize the central arguments of this chapter, which concern the multiple uses of a resource – a discursive frame to 'ride' diversity (the 'nationality-talk') – by members of a visited population interacting informally with tourists.[6]

Concerning the structure of this chapter, I first start by introducing the notion of informal encounter, which I consider increasingly relevant given the growing institutionalization of the tourism industry and the emergence/implementation of specific policies to regulate encounters and interactions between tourists and members of the visited population. The Cubans'/*jineteros'* uses of nationality-talk examined in this text must be situated within this realm, and a brief outline of some recent societal developments in Cuba draws attention to the growing importance that the informal economy and informal encounters between tourists and Cubans have acquired in the last decade. I then address the central issue of this chapter, namely Cubans'/*jineteros'* uses of nationality-talk in the realm of their informal encounters with tourists. In the discussion, I review the main issues addressed in this chapter, drawing parallels with other research and speculating a bit further on the question of the adaptability and control of resources.

The examples I use throughout the text are taken from the ethnographic fieldwork I carried out in Cuba in February, August–September 2005, and November–March 2006–2007, as part of a PhD research project. During the 7 months spent in Cuba, I gathered data through participant observation and conversations both with tourists and Cubans in the tourist poles of Havana (the capital), Viñales (a rural village), and Playas del Este (a beach resort to the east of the capital). In these diverse settings, I could observe several encounters between foreign tourists and Cubans, these happening in public places and under the scrutiny of the public gaze. Being initially perceived as a tourist, I also experienced a wide range of encounters with Cubans, many of them coming towards me in order to start a conversation and/or offer me something. Most of the data

presented in this text were audio recorded as digital files after events and conversations took place, based on my recollection of them after a time lapse of anything from a few minutes to several hours, depending on my situation.[7]

Conceptualizing Informal Encounters Between Tourists and Members of the Visited Population

Policies and regulations constitute an important instrument to frame, control and manage the development of tourism – as this dynamic phenomenon continues to grow and evolve, reaches new destinations, acquires new shapes and meanings, and generates new flows of exchange. Nevertheless, in spite of the efforts of policy makers, planners and developers, the professionalization and institutionalization of tourism are not all-encompassing, and as tourists flock to a destination, many interactions and exchanges are likely to occur at the margins or beyond the official channels provided – or at least suggested – by the different stakeholders involved in the formal tourism industry. As Crick puts it 'Through the Third World, where a tourism industry has developed, a similar 'informal' sphere has grown up around its margins' (Crick, 1992: 137), a sphere in which people deploy strategies to direct any 'free floating' resource that may be available (Crick, 1992: 139), and which, according to Timothy and Wall, has been largely neglected by researchers (Timothy and Wall, 1997: 336).

Besides the notion of informal tourist sector, I consider that the notion of informal encounter might be increasingly relevant in some tourist destinations, as policies are developed and/or implemented which tend to regulate and frame interactions between tourists and members of the local population. This is the case in Cuba, where the authorities can hinder, obstruct, and penalize informal contacts between Cubans and foreigners,[8] and where informality becomes a sphere – as relationally opposed to the formal, the official, the legal – which is not only related to the economic realm but to interpersonal relations. The existence of similar policies is attested in other tourist destinations, and points to the emerging pertinence of the general and encompassing notion of informal encounter in the tourist realm. In Jamaica, for instance, Mullings argues that '(…) tourism policies that seek to regulate the presence of the local population on certain public beaches (…) have the potential to label encounters between local community members and tourists as punishable forms of harassment.' (Mullings, 1999: 78).[9]

As stringent control and surveillance by the authorities restrain the development of non-authorized relationships between visitors and visited, they also limit the range of the possible strategies for approaching tourists (Dahles and Bras, 1999: 288). More generally, gaining access to tourists might require more skilfulness and ingeniousness when informal encounters are at stake, and when the tourism industry contributes to channel visitors into prescribed and official paths, discouraging encounters with the 'unplanned'. A whole repertoire of strategies and tactics is likely to emerge concerning, for instance, ways of classifying and understanding tourists, of catching their eye and capturing their attention, of creating profitable attachments with them as well as orienting their behaviour. These skilful and reflexive engagements with visitors, despite the fact that they

happen beyond the official tourism realm, and that researchers might therefore find them uncomfortable to access and difficult to investigate, certainly deserve our attention. Indeed, our investigations should not only follow the normative and selective paths traced by the authorities or the tourism industry. Furthermore, what might be described as marginal from a lawful perspective is, in certain tourist destinations, a very important phenomenon in which large portions of the tourist and local population are involved.[10]

To a certain extent, this seems to be the case in Cuba, and a brief outline of some recent societal and tourism-related developments on this island helps underline the growing importance of the informal economy and informal encounters between tourists and Cubans/*jineteros*.

The Cuban Case

From the beginning of the 1990s, Cuba has undergone the most dramatic changes since the revolution of 1959 (Palmié, 2004: 238). The collapse of the Soviet Union, which from the 1960s had entertained privileged economic relations with Cuba, resulted in a severe economic crisis on the island, 'described as the worst economic shock faced by any Latin American country during the 20th century' (Clancy, 2002: 78). The crises, aggravated by other factors such as the ongoing US embargo, prompted Cuba's leader Fidel Castro to declare in 1990 the beginning of a *periodo especial en tiempo de paz*, or 'special period in time of peace', a time of austerity and of reforms. Among the measures to alleviate the crises, the Cuban government fostered the development of tourism, considered as a sector capable of generating hard currency in a relatively short time (Resolución económica del V congreso del PCC, 1997, quoted in Argyriadis, 2005: 31), and implemented a variety of other important institutional reforms, legalizing, for instance, the possession of dollars (recently replaced with the peso convertible as a hard currency equivalent) and a certain number of private initiatives. Following a spectacular rate of growth, more than 2 million tourists visited Cuba in 2004 (there were about 340,000 in 1990), bringing hard currency into the country. Nevertheless, in spite of these governmental reforms and a certain degree of 'economic recovery' after the first years of the special period (1991–1995), characterized by dramatic shortages, the economic situation continues to be difficult for many people on the island, especially for those who do not have direct access to hard currency through a job in the tourism industry or remittances from relatives abroad (Argyriadis, 2005: 32).

In this situation, activities that escape state regulation – and tourism-related activities occupy a prominent place among them – have acquired an unprecedented scale. Following the massive arrival of people from abroad, a wide range of informal activities, which could hardly be completely framed and managed by the state, have flourished on the island. Indeed, in spite of governmental efforts to frame and control tourism, several Cubans have been trying to avoid governmental restrictions and to get opportunities to engage with tourists, offering their services as guides or companions, seeking foreign friendships, selling cigars, providing sex, illegal drugs, private taxis, accommodation or food, etc.

In this respect, it is important to remember that in Cuba any interaction with foreigners had the potential of being much more lucrative than any other activity. Therefore, since the 1990s, a huge black market and a wide set of informal activities have been prospering around tourists – epitomized by the diffusion of the terms *jinetero/a* and *jineterismo* (literally horseback riding) to evoke notions of tourism hustling and prostitution[11] – and most tourists visiting Cuba have been confronted with some kind of informal encounters with Cuban people.

Furthermore, as I experienced during fieldwork in Cuba, many tourists, far from being passive receivers of informal activities practiced by Cubans/*jineteros*, actively sought to engage in these informal interactions – for many different reasons – which might include their wish to get in touch with the locals and help them, to pay less for goods/services, to follow alternative paths, to listen to sincere narratives of Cubans' everyday lives or to get access to products and services formally unavailable (sex and drugs mainly).

This is a reminder of the fact that Cubans/*jineteros* were not the only ones bypassing governmental polices and recommendations and that, in spite of the efforts deployed by the government to channel tourists along official and lawful paths, some visitors, at least, preferred to do things 'their own way', seeking alternatives to what the industry provided and thereby questioning or ignoring its normative suggestions. Thus, within the tourist process in Cuba, informal encounters could be produced – following different paths and motivations – both by the local community and by tourists. In spite of the potential reciprocity of these engagements leading to the emergence of informal encounters, most of them where none the less initiated by the Cuban side, who also incurred the highest risks of repression by the authorities (tourists generally being the 'protected' ones).

In the following sections, the focus is on these Cubans'/*jineteros'* efforts to get in touch and engage with tourists, and on their strategies and tactics, addressed through the example of one of the resources they employed: nationality-talks.

Cubans'/*Jineteros'* uses of Nationality-talks

Framing tourists, orienting action

The example given at the beginning of this chapter clearly shows how nationality-talks could become a device to frame, classify tourists, and orient peoples' attitudes towards them. Indeed, the Cuban/*jinetero* friend mentioned earlier regularly mobilized a whole array of tourists' typifications based on their nationality, which he was likely to combine with appreciations and preferences for some nationalities over others.

In the course of my fieldwork in Cuba, I could repeatedly hear Cubans/*jineteros* establishing such classificatory lists of tourists. According, for example, to the owner of an illegal accommodation, the best tourists were the Canadians, followed by the Germans, tourists from the USA, the Northern Europeans, the Spanish and, in last position, the Italians (as they sometimes mistreated Cuban girls and were all a bit *mafiosos*) and the Mexicans (who were always drinking). For another Cuban man who was more into the business of selling drugs, cigars, and

whatever else tourists may have wished for (*Aquí hay de todo* ['Here there's everything'] was one of his expressions), the Italians were on the contrary the best tourists, as they were always consuming a lot, 'bringing oxygen', taking things, and being more in the *cubaneo*, as he put it. The Basques, 'crazy people' as he referred to them, were also the best,[12] followed by the Germans and the Canadians. As I asked him about the Spanish, he told me they were not so good, as they were generally following the lawful path of the government. These different examples show how similar traits could be emphasized for tourists with the same nationality, but be judged very differently depending on the Cubans/*jineteros* at stake and their activities. Craziness and consumption of illicit products, for instance, could be judged positively by Cubans/*jineteros* selling drugs but negatively by others renting rooms in their house, reminding us that 'the interests of those living in local communities seldom coincide' (Dahles and Keune, 2002: 6).

Of course, the relevance of these classificatory lists must not be overestimated, as I noticed they could also change quite rapidly depending on the situation and the persons interacting. Furthermore, generalities could be tempered quite easily if suitable. For instance, Cubans would seldom place the nationality of the tourists they were dealing with at the bottom of their list, or in that case they would generally emphasize how these tourists were a remarkable exception compared to their fellow nationals ('of course you are not like all the others', some would argue). Most Cubans I met showed great adaptive talents in this respect, underlined by the relational and dynamic character of their nationality-talks.

Nationality-talks were mainly used in all these different cases to frame visitors and orient the Cubans'/*jineteros*' actions towards them, but besides these cognitive functions there were other pragmatic ways in which diversity could be 'ridden'.

Catching the tourists' eye and setting the encounter's tone

While approaching tourists, many Cubans/*jineteros* played the card of tourists' nationality. This was not the only way to initiate encounters,[13] but it was never-theless a very important and recurrent one, and many of my Cuban/*jineteros* friends (and tourists too) acknowledged the reflexive use of this technique to strike up a conversation with visitors. Thereby, I was often confronted with expressions such as 'Hey, where are you from?' '¿Hola amigo, de que pays? [Hello friend, from which country?]' '¿Hola amigo, de que parte de España? [Hello friend, from which part of Spain?]' '¡España!' '¡Méjico!' '¿Basco, no?' Similarly, I could observe and listen to Cubans doing the same with other tourists – '*Ciao Italia!*' '¡*España tío!* ['*tío*' being a Spanish expression for fellow]', etc.

As for the examples examined earlier, these forms of address, and the tourists' responses, could certainly help Cubans/*jineteros* to orient their attitudes towards visitors, and some would, for instance, try to adapt their language in order to suit them. But besides this, such seemingly trifling approaches could also become extremely efficient in capturing the tourists' attention with some-thing they could obviously understand: they questioned them and urged for an answer, or at least a reaction. Whether asking an 'acceptable' and legitimate

question or directly framing tourist in terms of a given country or nationality, these forms of address were often arousing a reaction from tourists, be it only a glance. In some cases, after this first approach and as a response to it, a verbal exchange could originate between the tourists and Cubans/*jineteros* at stake, an exchange that could develop further into longer relationships, friendships, economic transactions, etc.

Similar forms of address by Cubans/*jineteros* took a more humoristic and provocative tone and relied increasingly on stereotypes attached to the geographical origin of tourists. Thus, as mentioned in the beginning of this chapter, I could listen to Cubans/*jineteros* catching the attention of Mexican tourists by jokingly using Mexican curse words, but also capturing the glance of Spanish tourists by referring humorously and with a big smile to their big belly full of *jamón de pata negra* (a particularly good quality Spanish ham), or greeting some Italian tourists while mentioning with slight irony the *mafia*. Accompanying these verbal expressions, and reinforcing their expressiveness, some Cubans/*jineteros* would also perform gestures and bodily movements that could equally evoke and mock the tourists' nationality, or (over-)emphasize some tonalities or accents of their idioms.

In these cases Cubans/*jineteros* were using national features and stereotypes in a provocative and playful way, positioning their exchange with tourists on a jesting level and projecting a positive light of carelessness on it. They were also appealing to the complicity of these visitors, who would sometimes react with increased irony and cutting witty remarks.[14] As the tone of the exchanges between tourists and Cubans/*jineteros* was playful and careless, the stereotypes generally hurt no one. What they did do, however, was to draw people together, who by sharing jokes and stereotypes were also partaking of a common discourse (Rapport and Overing, 2000: 347) – a discourse additionally marked by humour and amusement.

Besides these uses of nationality-talks to catch the tourists' eye, set the encounters' tone, and start an interaction with them, a slightly different situation saw nationality's discursive frame being employed to build trust, familiarity and multiply attachments between the protagonists involved.

Flattery, familiarity and trust: multiplying positive attachments

Following these initial attempts to capture the visitors' attention, and once tourists had given some response to it, one of the typical sequels consisted of commendatory remarks towards the nationality, or the country, of the foreigners at stake.

In my case, for instance, after I mentioned I was Swiss, several Cubans/*jineteros* argued that Switzerland was their favourite country, their second country, a country of peace and of clever people. Similarly, I could observe Cubans/*jineteros* telling Italian tourists that they loved Italy and Italians, saying to the Japanese that they admired Japan, to the French that Cuba and France were tied by the heart, etc.[15]

Other times, after knowing the tourists' nationality, several Cubans/*jineteros* started to talk about relatives and friends living in that country, in that town,

some of them even mentioning the name of a street they knew. In a similar vein, some would also mention or ask the name of the capital of the country at stake, of a football team, of a major feature or spot linked with that place or nation. Cubans/*jineteros* were thereby manifesting a concern for the tourists' countries or places of origin, they were showing interest, curiosity, and displaying their knowledge. Furthermore, through these exchanges, they were also building bridges and links between them and the visitors, producing familiarity and multiplying attachments.[16]

Sometimes, these comments took the shape of more explicit reassuring statements, with Cubans/*jineteros* arguing they had already sold this and that to tourists coming from the same place – thereby suggesting that they entertained recurrent and privileged relationships with similar tourists, and could be fully trusted. Occasionally, these discourses could become quite prescriptive, urging tourists to do as their fellow nationals did – the latter becoming positive referents that visitors could easily emulate.

In some other cases, the different remarks that produced commendation and familiarity were followed by denigrating comments on other countries and other nationalities, appealing to the tourists' complicity so that the shadows cast on the latter underlined the merits of the former.[17] Distinctions between tourists could also be articulated in terms of regional differences within one country, with the related praising of the tourists' region and the belittlement of people coming from other areas. This was often the case with Switzerland (Swiss Italians being different from Swiss French and Swiss Germans), Italy (south and north were often contrasted), Spain (Catalans and Basques becoming very peculiar), Mexicans (people from the capital versus others) or Canadians (French speakers as opposed to English speakers). Significantly, negative stereotypes towards some nationalities could become positive or give rise to exceptions as Cubans/*jineteros* interacted with tourists from that specific country, showing that the creation of consensus and of a good atmosphere was among their highest priorities.[18]

In all the examples examined in the previous sections, Cubans'/*jineteros*' nationality-talk, its multiple uses and deployments, were related to the places of origin of tourists. Nevertheless, on several occasions, the deployments of a similar discursive frame would result in Cuban nationality being used in tactical ways.

Prescriptive uses of Cubans' nationality and processes of 'Cubanization'

On many occasions, displays and uses of Cuban nationality took a kind of prescriptive tone, as people reassured or encouraged tourists to do some specific thing – have sex, buy drinks, party, dance to salsa music, etc. – arguing that this was the proper Cuban way of doing it, and that tourists should experience it that way.

For instance, this could take the form of praising remarks concerning Cubans' sexuality. In order to really experience Cuba, tourists were often encouraged to have sex 'the Cuban way'. According to many, Cubans were 'hot' and incomparable in making love. For one of my Cuban/*jineteros* friends, this aspect

– having sex with a Cuban – often appeared on his list of the 'Top 4' things to do in Cuba and, of course, he would be able to provide all four of them, whenever needed. In my case, I mentioned to some Cubans/*jineteros* (who were praising Cuban girls) that I had recently got married, people argued that this was not a problem at all, since in Cuba no one cared about that and I should do the same. With an encouraging and ironic smile on his face, one of them told me that in Cuba everyone had seven women, that here things were different, that I should enjoy 'the Cuban way' (*a lo cubano*).

As sex and moralities were 'nationalized', framed in national terms, so could be drinks, dances, food, objects, parties, etc.. 'Cuban' as an attribute would thereby become a value that could be attached to a very wide range of entities, processes of 'Cubanization' taking place constantly and starting sometimes to affect even tourists. *¡Ya está cubanizado!* ['He/she is already 'Cubanized'!'] was a flattering expression addressed to tourists that I repeatedly heard. And once tourists were 'Cubanized', even with the playfulness and irony that tended to characterize such remarks, they were likely to follow in other 'Cubanized' attitudes and behaviours: 'buy and share a bottle of rum, 'Cuban-style'?' 'Give a helping hand to your Cuban brother?'.

On all these occasions, diversity was 'ridden' as some specific traits and entities were 'Cubanized' and pragmatically used by Cubans/*jineteros* to try 'get it their way' with tourists – with the shades of authenticity coming often to reinforce the 'real' Cuban character of the elements at stake. This last aspect, the 'authentic' Cuban character of something, deserves closer attention, as it relates intimately to some features of informal encounters. Indeed, several Cubans/*jineteros* engaging informally with tourists would play the card of the 'real/authentic' Cubanness, as opposed to the 'touristic one', well aware that many tourists were trying to avoid the latter, to move 'backstage', beyond a 'tourist bubble' whose tautological connotations could be daunting and little honourable. For instance, I met several Cubans/*jineteros* who argued that by hanging around with them we would experience the 'real typical' Cuba, and not the 'touristy' one. The Cuba of the local houses, the families, the cheap clandestine rum, the Afro-Cuban rituals, etc., as opposed to the official and 'fake' image that package tourists would see (and take pictures of) from a bus window or by following a scripted tour with an official guide. Processes of nationalization and authentication went hand in hand as they reinforced each other and gave legitimacy to the discourses of Cubans/*jineteros*. For many tourists, it was probably here that laid the charm and power of informal encounters – gaining access to the 'real Cuba'[19] – and Cubans/*jineteros* would often take advantage of that. By playing the 'real', 'ordinary' Cubans, and by doing it successfully – as tourists could also become suspicious of *jineteros* and 'professional hustlers' – they would achieve a position which legitimized them to tell tourists what was Cuban and what was not, and to turn the nationality-talk resource to their profit.

Discussion

Starting from the first set of examples presented in the text, which concerned Cubans'/*jineteros*' uses of nationality-talks to categorize tourists, some interesting parallels can be found in other researches dealing with the images that members of the visited population have of visitors. Pi-Sunyer (1989), Evans-Pritchard (1989), Sweet (1989) and more recently Maoz (2006) are among the authors who have investigated how residents in tourist destinations frame, categorize and typify tourists. In their articles, they emphasize how these categories and classification systems rely on stereotypical images and representations which may be both resilient and long standing as well as dynamic, changeable and adaptable to a given situation (Evans-Pritchard, 1989: 95,102; Pi-Sunyer, 1989: 189; Maoz, 2006: 229). Indeed, both Evans-Pritchard (1989: 99) and Maoz (2006: 229) consider that locals' images of tourists are more likely to be developed from direct experience, whereas tourists may rely exclusively on stereotypes circulating in the media, 'irrespective of any face-to-face contact' (Evans-Pritchard, 1989: 99). One might also consider that, for members of the local population who want to engage and make business with tourists, inaccurate typifications of visitors can also mean less chances to understand their wishes and desires, and consequently to be able to cater for them (Hitchcock, 1999: 29).

Similarly to the Cuban cases considered here, among the classificatory devices employed by members of a visited population to make sense of tourists and orient their attitudes towards them, place of origin and nationality – thought not the only element at stake[20] – seem to play a crucial part in several tourist destinations.[21] According to Boissevain, for instance: 'Stories about arrogant Germans, complaining Dutch, and stingy Swedes circulate freely in Malta' (Boissevain, 1996: 14), and Hitchcock views them 'presumably as a coping mechanism and popular guide to behaviour'. (Hitchcock, 1999: 26), while Forshee reports how Indonesian vendors in Yogyakarta's Malioboro Street delighted in guessing games concerning tourists' nationality, and oriented their behaviour and demeanour in ways they considered more appropriate for each national type (Forshee, 1999b: 298).

As shown by the three other sets of examples, the diverse mobilizations and manipulations of the nationality frame would also become efficient in the hands of Cubans/*jineteros* to 'catch the eye' of tourists, to inform, suggest and prescribe the attitudes they should adopt, as well as to build attachments and familiarity between them. In this sense, while 'riding' diversity and emphasizing it, nationality-talks can paradoxically be seen as an initial bridge connecting people from different countries, guiding their attitudes towards each other, and affecting the course of their encounter. As a first hand, common, easily shared, and understandable resource, nationality-talks could bring strangers together and lead to the development of other attachments among them – the communication features and the nature of the relationship between them influencing whether these discourses were connecting or dividing. In this respect, the widespread collaborative and consensual attitude of Cubans/*jineteros* while approaching foreign tourists, with all its nuances and variations, become the key elements to be considered.

This raises another important question, which relates to the plasticity and adaptability of nationality-talks. While characterizing and classifying tourists, for instance, Cubans/*jineteros* tended to focus on traits and fragments which were relevant for them pragmatically and situationally, and were ready to amend and nuance their considerations if needed. Far from being ruled or limited by these categories and stereotypes, most of them seemed at ease playing and juggling with them. The same can be said in respect of Cubans'/*jineteros*' uses of their own 'nationalized' features, in the sense that what 'Cubanness' meant and implied could be formulated in order to fit the situation at stake – a wide range of things being potentially 'Cubanized' if convenient to do so.

In order to understand the great plasticity and adaptability of these nationality-talks, it is necessary to consider some important features of informal encounters, and more precisely the 'marginal' status of Cuban/*jineteros* within their own society [parallels can be drawn here with Valene Smith's Eskimo 'marginal men' (1989), and with Jill Forshee's *becak* drivers in Indonesia (1999b)]. Acting as mediators and cultural brokers for tourists, these people spent a great deal of their everyday life engaging in what Bruner has called the 'touristic borderzone'.[22] Furthermore, operating at the margins of any formal organization, Cubans/*jineteros* who engaged informally with tourists did not need to account for what they said and did with tourists to other people (for instance to managers of a tourism company or fellow Cuban citizens). They were not talking or acting on behalf of any institution,[23] and this helps understand the extreme plasticity of their nationality-talks. Their independence and marginality had the potential of making them more ready to adapt both to tourists' agendas and their own, disregarding the '(politically) correctness' or 'representative-ness' of what they were saying. If this implied more possibilities for lying and manipulating images of nationality, it could also occasionally translate into increasing scope for honest and sincere criticisms.[24] The reflexivity and instrumentality with which Cubans/*jineteros* mobilized nationality-talks, also implied a certain detachment from what they were saying, discursive resources being employed strategically and tactically to reach certain goals,[25] rather than for the sake of expressing any accurate or rigorous representation. These elements may suggest that informal encounters can potentially constitute a particularly spontaneous and creative 'touristic borderzone' – one in which people have a relatively high degree of control over the modalities of their exchanges, and which favours the emergence of amorphous and open-ended performances (Edensor, 1998: 66; Simoni, 2005b: 23) – but this may be pushing the scope of this chapter too far. Indeed, these reflections and interpretations still need to be assessed more thoroughly, and other empirical researches on informal encounters are necessary if we want to reach higher levels of generalization.

Concluding Reflections

At the beginning of this chapter, I argued that researches on informal encounters might give privileged insights on the strategies and tactics of members of visited populations, as they attempt to establish profitable bridges between them and visitors in ways that bypass the control of the tourism authorities. Through these

encounters and interactions, many people living in tourist destinations try to gain some economic benefit from the presence of foreign tourists. Nevertheless, in order to engage with tourists and develop a profitable relationship with them, members of the local community should also be skilled in catching the tourists' attention, in infusing trust, light-heartedness, and familiarity in their encounters, and in informing and orienting the tourists' attitudes. These elements become very important once the people at stake are not employed in the formal tourist sector, and work on the margins of the official tourist realm. Access to tourists can then be harder, or even dangerous, and under these conditions the establishment of contacts with them is likely to require more effort and active engagement.

In this chapter, I have focused on the strategic and instrumental uses of an intangible resource – what I have termed nationality-talks – in order to explore some of the modalities in which it could be employed during informal encounters between Cubans/*jineteros* and foreign tourists. Thereby, we have seen how nationality-talks could become a cognitive tool to frame and classify tourists, and to orient and guide the performances of Cubans/*jineteros* who wanted to interact with them. Beyond this cognitive dimension, I have also examined three other sets of cases which exemplify how nationality-talks could be employed to 'ride' diversity: catching the tourists' eye and set the tone of their encounters, building familiarity and multiplying positive attachments, and finally prescribing tourists the attitudes they should adopt.

As argued in the discussion, a recurrent feature running through the different examples was the changeable and adaptable ways in which Cubans employed the discursive frame of nationality. This can be interpreted in relation to the independence and marginality of Cubans/*jineteros* from institutions, and as a manifestation of reflexivity, detachment, and instrumentality (without excluding occasional outbursts of more 'emotionally grounded' meanings or 'passionate sincerity'[26]). Somehow, similarly to Forshee's *becak* drivers, Cubans/*jineteros* engaging informally with tourists seemed to 'derive their brokerage expertise from being able to manipulate cultural knowledge' (Forshee, 1999b: 308), nationality-talks being among those resources which could help bring together disparate people, agendas and expectations.

To conclude, I hope this chapter can stimulate further research on the strategies and tactics of people who operate at the margins of official tourism projects, on the resources that are available to them, and on their ways of using them. The considerations made here should at least serve as an appeal to tourism planners, promoters and developers, not to underestimate the abilities of these 'marginal men and women' – whose work may be marginal in respect to official institutions, but remains central for the lives and experiences of many.

Endnotes

[1] *Jinete/Jinetero* is the Spanish term for horseman, rider (which explains the term 'riding' in the title of this chapter). Within the context of tourism in Cuba, the term *jinetero* evoked the idea of Cubans 'riding' the tourists, and was generally associated with notions of tourism hustling and prostitution. The designation of someone as *jinetero/a* could become a very delicate and controversial issue in

Cuba, especially since *jineteros/as* were not viewed well by the authorities, and were the occasional targets of police questionings and even arrests. Seeing also the frequent disputes among Cubans and tourists concerning who was a *jinetero/a*, who was engaged in prostitution, hustling and illegal economic activities with tourists, and who was, on the contrary, just having a disinterested chat with some foreigners, it becomes important to consider how these elusive categories could be deployed and contested in different situations. To try to keep these ambiguities alive, without straightforwardly imposing the *jinetero* label, I use in this text the expression Cuban/*jinetero* – the sign '/' indicating both a potential identification and a disjuncture. All through this chapter, I also use the general and indefinite plurals 'tourists' and 'Cubans/*jineteros*' – thereby meaning 'some tourists' and 'some Cubans/*jineteros*' – to refer to a wide range of actors who differ in terms of age, sex, ethnicity and personal background. In most cases, though, the Cubans/*jineteros* referred to were male and under 40 years old.

2 As it is detailed in the following section, encounters are qualified as informal – in analogy to what Crick has written on the informal tourist sector (Crick, 1992) – to the extent that they happen beyond the control of the tourism authorities and are susceptible of being repressed.

3 Dahles follows Boissevain's distinction between *patrons*, 'who primarily control first-order resources' and 'manipulate the private ownership of means of production for economic profit' (Dahles, 1999: 9) and *brokers*, 'who control predominantly second-order resources' and 'act as intermediaries' (Dahles, 1999: 9). Similarly to Boissevain's *brokers*, Crick writes about street guides in Sri Lanka playing the "middleman' role" and being rich in terms of 'cultural capital' (Crick, 1992:138). The Cubans/*jineteros* considered in this chapter can also be apprehended as 'brokers' and 'middlemen'.

4 My focus is on the instrumental and reflexive uses of 'nationality-talks'. Therefore, even if I recognize the importance of more expressive and emotional aspects of nationality, I will not deal with them in this chapter.

5 On a more general level, for instance, Cubitt writes about 'the imposition of the conceptual grid of nationality on exchanges and interactions in the global arena' (quoted in Edensor, 2002: 29).

6 These uses might also be found in other tourist destinations, and I hope that their examination here can encourage other researchers to investigate similar issues elsewhere. This would in turn bring more insights and understandings to the strategies and tactics employed by people whose activities are still largely neglected in tourism research.

7 In some cases though, data were video recorded directly 'on the spot' by Bastien Birchler – a colleague of mine also doing research in Cuba – as we were strolling around Havana, and I thank him for allowing me to use this material.

8 The legal bases of this penalization seem to consist of a vagrancy law, passed in 1971 by the Council of Ministries (*Ley contra la vagancia*, No. 1231) (Palmié, 2004: 241; Rundle, 2001: 2), and of the Articles 72 and 73 of the Cuban Penal Code on 'indices of dangerousness' (Turnbull, 2001: 364; Cabezas, 2004: 9). In the course of my fieldwork, several Cubans used the expression *asedio del turista* ('siege'/hustling of tourist) while referring to the accusations of the police towards Cubans engaging with tourists. More generally, the police use a system of warnings (*carta de advertencia*, or *carta de avisos de molestia al turismo*, 'warning of nuisance of tourism', according to Tiboni, 2002: 41), combined with fines, to penalize Cubans accused of *asedio*: after three warnings, people risk facing some years in jail/rehabilitation centre (three according to most of the Cubans I heard

talking about it). Nevertheless, sanctions are sometimes negotiated between the police and the people accused, and I often heard of payments of bribes or sexual favours given to officers in exchange for clemency (see also Cabezas, 2004: 9). Furthermore, some Cubans accumulate dozens of warnings but keep avoiding the jail, thanks probably to bribes, good relational networks, or collaboration with the police (see also Tiboni, 2002: 41).

[9] See also Getfield article on tourism harassment in Jamaica (2005).

[10] Forshee also reminds us that 'Actions at the 'peripheries' (…) in themselves are central to particular peoples' lives and experiences' (Forshee, 1999: 10). Pushing the argument further, this author follows Barbara Babcock as she emphasizes that 'what is socially peripheral is symbolically central' (Forshee, 1999: 13, note 17).

[11] See note 1 for a discussion of the terms *jinetero/a* and some of their implications.

[12] According to him, I looked a bit like a Basque, with the clothes I was wearing and with a bit of a *gipsy* look.

[13] Among the most common ways of approaching tourists were also asking for the time or for a cigarette/a lighter – especially if tourists were smoking (see Simoni 2005b for more details).

[14] As argued by Abdallah-Pretceille, the modalities on which a communication is engaged become the crucial elements to consider in order to understand and assess the role played by cultural categorizations and, in this case, national stereotypes (Abdallah-Pretceille, 1997: 380). A similar stance is taken by Herzfeld, who argues that what gives stereotypes significance, 'is not so much their actual form (…) as the social uses to which they are put' (Herzfeld, 2005: 16).

[15] The extreme adaptability and the overemphasized character of certain commendatory remarks of Cubans/*jineteros* often had the counterproductive effect of rising tourists' suspicion concerning the sincerity of some of them. This raises the more general question of tourists' reactions to Cubans'/*jineteros*' nationality-talks, which deserves closer attention but is not developed further here.

[16] I did observe very similar procedures being used by merchants towards foreign tourists in Ladakh, India (Simoni, 2005a).

[17] Again, the same happened in Ladakh (Simoni, 2005a). A parallel can also be traced here with the considerations of Rapport and Overing, who argue that: 'stereotypes are never alone. At least one contrast is entailed and very often an entire set' (Rapport and Overing, 2000: 346).

[18] The stunning degree of adaptation to tourists and to a given situation was emphasized by a Cuban/*jinetero* who told me that he could see what kind of person [tourist] he was dealing with. As a consequence, he argued that if he [the tourist] was cultured, he [the Cuban/*jinetero* at stake] was [would become] cultured, if he was a delinquent, he was a delinquent – the important matter being to do things well, to be a professional, to be top-level, to have ethics (ethics meaning for him 'to do things well', *hacer bien las cosas*). A parallel can be drawn here with the remarks of Bowman on street merchants in a Palestinian tourist market: 'Street merchants prided themselves on chameleon-like qualities, being able to shift language, religion, politics and even their national identity to suit what they perceived to be the tastes of potential customers' (Bowman, 1996: 90).

[19] We might consider here that many tourists in Cuba were suspicious of governmental propaganda and misinformation, and thereby attributed high value to the opinions and ideas of 'ordinary citizens'.

[20] As suggested by Dahles' research on street guides in Indonesia, many other elements may become relevant while classifying tourists and considering the most suitable behaviour to adopt (Dahles, 1998: 35).

[21] See the works of Pi-Sunyer in Catalan resort towns (1989), Crick in Sri Lanka (1992), Dahles (1998) and Forshee (1999b) in Indonesia, and Boissevain in Malta (1996).

[22] According to this author, the touristic borderzone, 'a zone of interaction between natives, tourists, and ethnographers' (Bruner, 1996: 177), 'is a creative space, a site for the invention of culture on a massive scale, a festive liberated zone, one that anthropology should investigate, not denigrate'. (Bruner, 1996: 159).

[23] As noted by Crick, and similar observations may apply to many of my informants in Cuba: 'street guiding in Kandy is normally a highly individualistic occupation. Although small groups of guides would congregate in cafes or on street corners (partly for protection, I suspect), business was overwhelmingly an individual affair.' (Crick, 1992: 140).

[24] As argued by Forshee: 'those least 'absorbed' in their own societies are perhaps the most able (or at least the most motivated) to slip between the margins with other people, entering a new region in which they might function as critical agents'. (Forshee, 1999b: 302). According to some of my Cuban informants, potential criticisms of Cuban society and political system were among the reasons why their interactions with foreigners were discouraged and repressed by the authorities, as they argued that 'they [the authorities] don't want us to speak with you and tell you the truth [about life and the situation here in Cuba]'.

[25] Writing about cultural politics, the constructions of culture by travel firms and their interconnectedness on a global scale, Burns remarks how 'The local people may cooperate in this enterprise because it might be in their best economic interests so to do' (Burns, 2005: 395).

[26] Forshee quotes Turner (1969) as he notes of 'marginal people' that 'there is often a passionate sincerity behind their strivings as they struggle to form relationships with others'. (Forshee, 1999a: 313, note 13).

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7 Destination Image Revisited: the Dutch Market Perceptions of Morocco as a Tourism Destination

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Background and Conceptual Framework

Introduction

In an overcommunicated society (Ries and Trout, 2001: 3), a troubled 21st century, and a very crowded tourism market place (Morgan and Pritchard, 2004), where the lion's share of tourism receipts goes to the top five destinations (UNWTO, 2005), and where emerging tourism destinations are growing strong, low brand or no brand destinations face bigger challenges to create a positive and strong image (Kotler and Gertner, 2004). Images are based on perceptions (Reich, 1999). A clear understanding of tourist perceptions is crucial for developing a sustainable tourism industry and for developing successful positioning strategies (Reich, 1999; Sönmez and Sirakaya, 2002). The decision to travel comes from a perception. Negative perceptions and misconceptions affect the propensity to travel. A critical component in destination positioning is the determination of what tourists will desire in the near and long future. Perceptions help to understand the target market and will play a major role in determining the most effective position of the destination in the market place (Reich, 1999).

Numerous studies of host community tourism perceptions and attitudes have been conducted over the past few years (Sheldon and Var, 1984; Pizam and Pokela, 1985; Liu and Var, 1986; Milman and Pizam, 1988; Keogh, 1990; Long *et al.*, 1990; Ross, 1992; Lankford, 1994; Mason, 2002). Several studies have assessed the perceptions that hosts and guests hold of each other (e.g. Doxey, 1975; Hunt, 1975; Pearce, 1980; 1982; Milman *et al.*, 1990; Ross, 1992; Reisinger and Turner, 2002a, 2002b); and analysed the influence of nationality on tourist behaviour (e.g. Pizam and Sussman, 1995; Pizam and Reichel, 1996;

Pizam, 1999). However, not much has been written on the interplay of perception, immigrants, and propensity to travel. The realities of the 21st century, where communication has become borderless and country borders almost obsolete in several parts of Europe, have made the study of destination image more complex. Considering that immigration is growing steadily in the USA, Europe and other countries and that, today, countries have more or less distinct population sets (diasporas) within their borders (Ouellet, 2007), to understand the image of a tourism destination it has become necessary to study the interplay that immigration has on travel propensity and destination choice. Current literature on cross-cultural marketing and consumer behaviour has acknowledged the effects that ethnicity, animosity, and consumer racism have on consumer choices and willingness to buy a product or service (Ouellet, 2007). In the leisure literature (especially in North America), there is a mature body of knowledge on leisure participation, constraints and negotiation. In the tourism literature, however, there is a small but growing number of researchers acknowledging the importance of studying tourism in relation to diasporas and space (e.g. Coles and Dallen, 2004). The primary concern of this chapter is to investigate the extent to which tourism destination images are impacted by tourists' perceptions.

Immigration: hospitality revisited

In her book *Postcolonial Hospitality: The Immigrant as Guest*, Rosello (2001) offers academics a platform to look at hospitality in tourism from a more critical perspective. Because of the growing number of immigrants and the resulting cross-cultural 'encounters', one would argue that 'hospitality' starts at home. That is, unlike a few years ago when the early immigrant was a real stranger, the growing numbers of immigrants, today, has transformed the culture shock into what might be called 'culture unrest'. Culture unrest might refer to the context where two cultures live together, but at a level of acceptance that has developed from euphoria, apathy, to annoyance, or even antagonism in some contexts. A quick glance at the *List of 7182 Documented Refugee Deaths through Fortress Europe* may depict the level of desperation of people in immigrant-generating countries, and intolerance, nationalism, racism, and fascism in European policies and states (UNITED Campaigns, 2007).

The enlargement of the European Community, and the resulting increase in immigration (e.g. refugees, asylum seekers, commuters, delocalized workers) present new challenges to the definitions of hospitality (Rosello, 2001), and represent a new reality for marketers (Ouellet, 2007), and destination marketing organizations (DMOs). Hospitality in this context is not related to tourism but to immigration and to the persons who for one reason or another have been compelled, or have willingly decided, to leave their country of origin for another country, either to work, seek asylum, or to realise a dream. For example, in the France of the French Revolution, hospitality was an integral part of its revolutionary thinkers. In *Essai de constitution* Saint-Just (1793) states:

> The French people declares itself to be the friend of all peoples; it will religiously respect treaties and flags; it offers asylum in its harbors to ships from all over the world; it offers asylum to great men and virtuous unfortunates of all countries; its ships at sea will protect foreign ships against storms. Foreigners and their customs will be respected in its bosom (in Rosello, 2001: 3).

But dominant ideologies and policies do not remain unchallenged for long (Rosello, 2001). Rosello (2001: 3) argues that: 'hospitality is indeed in crisis, not simply because our contemporary (Western) world may not have enough of it, but because it is in the process of being redefined' (Rosello, 2001: 8). While immigrants were generally welcome in some countries, the hospitality of those receiving countries has been challenged, and government anti-immigrant policies toughened. Even if there are still immigration-friendly ideologies and policies in some states, the number of the natives who see immigrants as parasites or perceive them to be burdensome has been growing. The rise and fall, and rise and rise of the extreme right in old as well as new nation states is a testimony to the need to revise hospitality in the immigration context.

Interestingly, Stephenson (2004: 74) has empirically investigated the impact that racialism has on the experiences of the UK Afro-Caribbean diaspora, and concludes that:

> The anticipation and experience of racialism in 'white spaces' in Europe indicates that Afro-Caribbeans are routinely marginalized from experiencing the possible social benefits of tourism as other national citizens, including: recreational pleasure, educational awareness, self-actualization, social esteem and mutual interaction. This is despite the fact that they have a legitimate right to British/European citizenship.

The UK Afro-Caribbean tourism community's willingness to travel, destination choice, and tourism satisfaction have been constrained by the perceptions of the white community. The testimonies of Stephenson's respondents reflect how far racial alienation limits the opportunities to travel outside their own cultural and ethnic domains, giving hospitality another face. This is another example amplifying the immediate need for these concerns to reach the widest audience of academics, policy makers and representatives of the travel and tourism industry. Consequent strategies for achieving mutual exchanges, constructive experiences and positive encounters may then develop to the sociocultural advantage of diasporic groups (Stephenson, 2004) as well as contribute to a healthy hospitality ratio; whereby host and guest work together towards the realization of a harmonious society. For that to happen, the codes of hospitality need to be redefined (Rosello, 2001). As Rosello (2001: 3) ironically puts it: 'the vision of the immigrant as guest is a metaphor that has forgotten that it is a metaphor'. Because there is no such thing as unconditional hospitality, hospitality needs to be revisited and negotiated.

Thus, it is postulated that this context of culture unrest has a negative impact on destination choice and travel propensity. Destination choices are influenced by external factors, such as time, destination attributes, perceived cost of tourism product, buyer characteristics and benefits sought; and internal factors, including motives, attitudes, beliefs, images, perceptions (Cooper *et al.*, 2005) and stereotypes (Reisinger and Turner, 2003).

The primary purpose of this chapter is to assess the perceptions that the Dutch people have of Morocco as a tourism destination. The goal is to provide an empirical background to help tourism officials and policy makers to enhance the positive perceptions and change existing misconceptions of the destination (Morgan and Pritchard, 2004).

Perception

Many researchers have investigated the image formation process. The three main sources of destination image formation are promotional material, secondary experience, and the media. These combine with personal characteristics to produce a destination image. Destination image is also affected by perception, attitudes and stereotypes that potential tourists hold about the destination, including its physical and natural attributes, and people (Fridgen, 1991). The way potential tourists perceive a destination influences their travel decision choice. Perception is defined as the 'process by which meaning is attributed to an object, event or person' (Reisinger and Turner, 2003: 148). Perception shapes the way people relate to each other (e.g. Moutinho, 1987). Perception can be created without experience and knowledge of the destination, including the destination attributes and host population. Perception influences the attitude to travel to a destination, because the decision to travel comes from people's feelings and cognition. What people think and feel about a destination is subjective and the meaning they construct about that destination is subjective, as well. Perceptions are shaped by the environment in which people live. People have different perceptions because they have different values and views of the world. Thus, perceptions reflect the external and internal environment of the perceiver. Perceptions 'depend on people's value orientations, expectations, experiences, and interests that are culturally determined' (Reisinger and Turner, 2003: 149). Perceptions may be positive or negative and differ in intensity, depending on the environmental influences that shape the perceiver's feelings and cognition about the destination. Reisinger and Turner (2003: 151) have found three types of perceptions that play an important role in social interaction in tourism:

1. Perceptions of other people (for example, tourists' perceptions of hosts and hosts' perceptions of tourists).
2. Perceptions of one's own (tourists' perceptions of themselves and hosts' perceptions of themselves).
3. Perceptions of the perceptions, called metaperceptions, indicate how others [people] perceive they are perceived (tourist perceptions of how they are perceived by hosts).

The theory of metaperceptions is interesting because it explains how similarity in perceptions can determine host–guest relations. If the host population perceive that tourists perceive them positively they will also perceive their guests positively, and vice versa. It is, therefore, critical to develop positive perceptions in the minds of potential tourists for successful tourism visitation and encounters

(Goodrich, 1978). Stephenson's (2004) account may relate to the theory of metaperceptions in that his concern revolves around how the UK Afro-Caribbean community perceives to be perceived by the UK white community.

Developing positive perceptions is challenging because perceptions are shaped by a combination of several interacting environmental factors. 'If the meanings [formed] are culturally similar and familiar, positive perceptions develop. If the meanings are culturally dissimilar, negative perceptions result'. Accordingly, 'perceptions can be distorted by biased sources of information, culturally influenced media, stereotypes, ethnocentrism, physical appearance, quick jumping to a conclusion, or 'hallo effect''. Therefore, perceptions can be inaccurate but can also be detected and corrected (Reisinger and Turner, 2003: 154–156).

Perceptions are shaped by stereotypes, and stereotypes affect destination image and tourist visitation. 'Most country images are stereotypes, extreme simplification of the reality that are not necessarily accurate. They might be dated, based on exceptions rather than patterns, on impressions rather than on facts, but none the less pervasive' (Kotler and Gertner, 2004: 42), difficult to change, inflexible and long lasting (Reisinger and Turner, 2003).

Stereotypes

Perceptions are shaped by stereotypes, and stereotypes affect destination image and tourist visitation. Cross-cultural misunderstanding is generated by negative stereotypes. Generally, people hold stereotypes about people. According to many authors, people use stereotypes when they lack deep knowledge of each other (Triandis, 1972; Fridgen, 1991; Reisinger and Turner, 2003). Stereotypes play a role in influencing not only the perceptions that tourists have of hosts but also the perceptions that hosts hold of guests. Stereotypes of hosts and guests are shaped by several sources of information, including the media, tourism literature, educational sources, and prior travel experience (Reisinger and Turner, 2003).

A stereotype 'is a socially shared set of beliefs about traits that are characteristic of members of a social category' (Greenwald and Banaji, 1995: 14). It is a 'cognitive structure that contains the perceiver's knowledge, beliefs, and expectancies about some human group' (Hamilton and Trolier, in Reisinger and Turner, 2003: 133). Allport (1954: 191) defines stereotype as 'an exaggerated belief associated with a category'. Stereotypes are perceptions of the characteristics of social groups, and are often cited as contributing to intergroup prejudice and hostility (Allport, 1954). Stereotypes may be measured explicitly or implicitly. Generally, stereotypes are resistant to change, and are long lasting. They may be enhanced, reduced or changed. They are usually inaccurate and may often contribute to negative and prejudicial evaluations and actions (Greenwald and Banaji 1995). However, they are functional and serve a purpose, in that they offer an idea about popular beliefs and identify the characteristics of a culture or a group of people. They help to create indicators of people's attitudes and feelings that are strongly positive or negative, as well as to understand the sources of conflict (Reisinger and Turner, 2003).

In general, changing negative stereotypes may occur through creating positive perceptions of the stereotyped group, providing information about the variability that exists within the stereotyped group, and reducing the tendency for individuals to use stereotypes when judging particular groups. By assisting individuals in identifying the nature of their stereotypes and providing them with information that suggests their stereotypes are false, change is possible. Means for doing this include exposing individuals directly to members of the stereotyped group (contact hypothesis) or through educating individuals outside of contact about the characteristics and variability of and within the stereotyped group (Reisinger and Turner, 2003).

Stereotypes and perceptions form emotions. These emotions may play the role of push factors for visiting a place (Morgan and Pritchard, 2004). People's cognition and feelings about a destination affect the image that they have of that destination and the propensity to visit it. The interplay of stereotypes, perceptions, emotions, attitude, and propensity to travel are depicted in Fig. 7.1. What people know about a destination or, in some cases, what they do not know, shapes the perceptions that they have of that destination. Perceptions help to form stereotypes. Positive stereotypes help to form positive emotions, which in turn shape the image that people have of the destination and affects their attitudes and travel propensity (or behaviour). Therefore, perceptions and stereotypes form the foundation of the study of destination image, attitude and travel propensity.

Furthermore, destination attributes and price are important determinants of tourism demand, but they are not the only determinants. Destination branding experts argue that 'the battle for customers in the tourism industry will be fought not over price but over the hearts and minds – in essence, branding will be the key to success' (Morgan and Pritchard, 2004: 214). Branding can help a destination overcome the challenges of negative perceptions and misconceptions.

Destination branding

A country's image results from a number of factors, including its geography, history, politics, art and music, famous citizens and other features (Pearce, 1982; Fridgen, 1991; Kotler and Gertner, 2004). These may positively enhance a
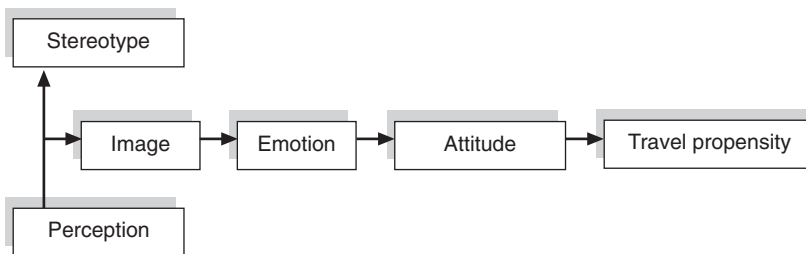
Fig. 7.1. Perceptions and stereotypes as the foundation of travel propensity.

destination. However, 'societal ills such as epidemics, political riots, civil rights violations, attacks on the environment, racial conflict, economic turmoil, poverty and violent crime' negatively affect the image of a destination (Kotler and Gertner, 2004: 42). These negative events strongly identify with certain places (Kotler and Gertner, 2004; Morgan and Pritchard, 2004; Wanjiru, 2005) and the negative image is very difficult to cure (Wanjiru, 2005). That is because, in an overcommunicated society to be heard has, generally, become more difficult than ever before, and the case for destinations that have a negative or weak image is even worse. Escalating tourist competition, resulting from global tourist receipts and arrivals, shifting market share, changing market growth rates and tourism demand, have made states, regions, and cities commit considerable efforts and funds towards enhancing their tourism images and attractions. According to destination branding experts (see Morgan and Pritchard, 2004), it is not enough for destinations to 'showcase their history, their culture and their beautiful scenery in their marketing', because many destinations have these attributes (Morgan and Pritchard, 2004: 64–65); the challenge is to connect socially and emotionally with tourists and identify with their values.

Branding is perhaps the most powerful weapon available to contemporary destination marketers confronted by tourists who are increasingly seeking lifestyle fulfilment and experience rather than recognizing differentiation in the more tangible elements of the destination product such as accommodation and attractions. (Morgan and Pritchard, 2004).

In addition, branding is 'an extremely complex and highly political activity that can enhance a nation's economy, national self-image and identity' (Morgan and Pritchard, 2004). Destinations may be impacted by worldwide or destination-specific crises. The importance of these crises necessitates high involvement of public and media relations, including both crisis communications and public relations (Morgan and Pritchard, 2004). Branding strategies are not a 'creation of "clever" entrepreneurs' but are a result of changes in society. Marketers and public officials need to capitalize on the positive changes that are taking placing in their country, thereby reshaping the country's image, reputation and differentiation (Freire, 2005). Researchers have indicated that banding is created through image (Pritchard and Morgan, 2001; Kotler and Gertner, 2002).

Branding is a new strategy that has the potential to help minimize negative perceptions and optimise the positive ones (Kotler and Gertner, 2004; Morgan and Pritchard, 2004; Freire, 2005; Wanjiru, 2005). As travel destinations turn to branding for differentiation, they must comprehensively assess all values held in their potential market areas to maximize their appeal (d'Hauteserre, 2001).

Conceptual framework

Sussmann and Unel (1999: 211) argue that: 'images are the results of composite perceptions which are, in turn, dictated by attitudes to result in a positive or negative image'. Therefore, to understand the perceptions that the Dutch have of Morocco as a tourist destination, it is necessary to investigate the perceptions that the Dutch people have of the Moroccan community living in the

Netherlands, and the Moroccan people living in Morocco. The immigrant community does, to a certain extent, mirror the host community at the destination, and vice versa. (Or, although a few differences might have taken place as a result of historical events, and host and guest encounters, they might, sometimes, be subtle and therefore difficult to notice without a looking glass.) Accordingly, a positive perception may positively affect destination choice, and a negative perception may discourage visitation.

The people who have immigrated to the Netherlands for one reason or another, and those who were born from a parent or both parents coming from abroad are called 'allochthon'. In 2015 they are projected to represent 15% of the Dutch population. Numbering 315,000 in 2005, the Moroccans constitute the third largest allochthon-non-western-community in the Netherlands, after the Surinamese (328,000) and the Turkish (358,000) (Statistics Netherlands, 2005).

According to the Dutch media, Dutch-Moroccans are generally perceived to be the least integrated community in the Netherlands. Long before September 11, the assassination of Pim Fortuyn and the murder of Theo van Gogh (Jaarrapport Integratie, 2005), the integration of the Dutch-Moroccans in the Netherlands has been perceived by many Dutch people, also known as 'autochthon' or 'native Dutch', as a 'multicultural drama' (e.g. Schnabel 2000; Scheffer, 2002). Criminality, unemployment, dependence on social welfare, and school dropouts have been used by the Dutch media as direct proxies for measuring integration into Dutch society. For example, in 2004, the total percentage of the unemployed labour force in the Netherlands represented 6.4%. For the native Dutch it is 5.2%, and for the Moroccans it reached 22.3%, marking the largest percentage of the unemployed labour force in the country (Statistics Netherlands, 2005). In 2003, about 1.6 million people aged 15–64 were eligible for disability benefit, unemployment benefit, or income support. While this number constitutes 14.4% of the represented population, it is about 28% for the Moroccan population, the second highest after the Turkish (29%) (Statistic Netherlands, 2005). These proxies, with other factors/indicators related to religious and sociocultural values, contribute to the shaping of perceptions and stereotypes that the Dutch have formed about the Moroccan community living in the Netherlands. To some politicians (e.g. Fortuyn and Schnabel), 'cultural difference are the main cause for social problems [in the Netherlands]' (Vermeulen, 2004: 2). According to Vermeulen, for example, the political discourse of immigration has shifted from a discourse of integration to that of assimilation. Assimilation is seen as a modern way to harmonize society. 'The only way integration in – Dutch, for that matter – society can be successful is when allochthones give up their own culture and assimilate to dominant values and norms' (Vermeulen, 2004). However, like other critics in Dutch society, Vermeulen criticizes what he calls the 'modernist values of equality'.

From this background, as the world becomes more globalized and cultures interact continuously (Sönmez and Sirakaya, 2002), the author of the present study postulates that if the host country (the Netherlands) perceives the immigrant population (the Moroccans living in the Netherlands) positively, tourists from the host country (native Dutch) will also perceive the country of origin of the immigrant community (Morocco) positively and consequently visit

the country (Morocco). A negative perception will detract the native Dutch tourists from visiting Morocco. Accordingly, the objectives of this qualitative study are: (1) to assess the image that the Dutch have of the Moroccan community living in the Netherlands, (2) to assess the image that the Dutch have of the country Morocco, (3) to assess the projected image of Morocco as a tourism destination for the Dutch tourist and compare it with the perceived image. It has been acknowledged that 'the tourist image is only one aspect of a country's general image' (Sönmez and Sirakaya, 2002: 188).

The complexity of the theoretical relationship is depicted in the following conceptual model (Fig. 7.2).

Method

A destination image study is unique to that specific destination. That is, there is no one fit-all instrument or cookbook that can be used to examine the image of different destinations. No matter how similar destinations may be, it remains that each has unique make up, attributes and characteristics. It is needless to argue
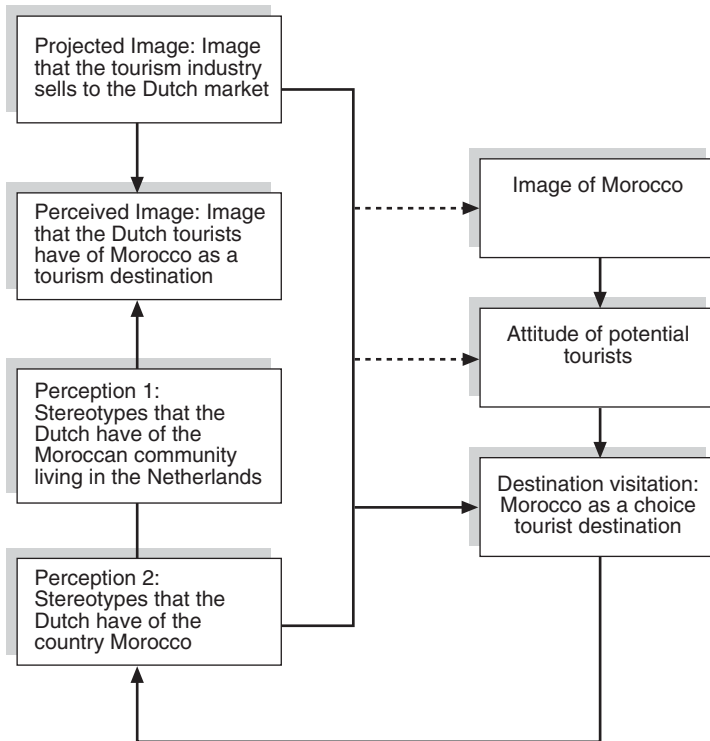
Fig. 7.2. A conceptual model depicting the interplay between image, perception, and destination visitation.

that not all coastal destinations are like Spain, and that not all Mediterranean or Middle-Eastern destinations are like Morocco. Several authors have criticized the dominance of research based on scale construction when studying image for reasons including the following:

- Respondents can respond only to variables identified by the researcher (Sönmez and Sirakaya, 2002);
- It is possible for respondents to enter simultaneously both positive and negative components of image (Auckland is both seedy and exciting) (Echtner and Ritchie 1991);
- Individual components of image can possess both positive and negative connotations (Auckland is multicultural);
- Images are contextualized within the myths of 'the unchanged', 'the un-restrained', and 'the uncivilized' (Echtner and Prasad, 2003).

In addition, the author was not successful in finding a comprehensive study that used an existing instrument or has developed a tailor-made one. Thus, to meet our research objectives, we have chosen a qualitative research design. To capture the feelings or beliefs of respondents we have used the two most common perception measurement techniques: open-ended questions and interviews (Reisinger and Turner, 2003: 157). The sample size consisted of 34 respondents aged between 15 and 64 years old, who have never visited Morocco. To have a representative sample, we interviewed people living in large cities, mid-sized cities, and small towns and villages. Opinions from female and male students, full-time employed, unemployed, as well as retired respondents were obtained. Each interview took on average 25 min. Not to influence the interviewee's answers and to prevent bias from accruing, the interviewers were Dutch-non-Moroccans, who were initially trained by the author himself. Respondents had the choice to do the interview either in Dutch or in English.

The following scheme has been used to guide our interviews after introducing the study and its purpose:

(1) To get opinions about the stereotypes that the Dutch hold about the Moroccans, we started with a general question about the immigrant communities living in the country. We asked: 'What do you think about the immigrant communities living in the Netherlands?' We then focused on the Moroccans and asked: 'What do you think about the Moroccans who live in the Netherlands?'

(2) To get information about Morocco as a tourism destination, we asked: 'What comes to your mind when you think of Morocco as a tourism destination?' We probed by asking: 'Do you remember an advertising or promotion campaign about Morocco's tourism? Tell us what do you recall about this ad? What is the source of this ad?'

(3) To find out how is Morocco positioned in the minds of potential tourists, relative to competitors, we asked: 'If you were to select a tourism destination, which one would you like to visit: Tunisia, Morocco or Turkey? Can you tell me why you have selected this destination?' We asked: 'Would you like to visit Morocco in the future? Why?' Or, 'Why not?'

(4) To get information about the perceptions of the country Morocco, we continued with: 'Now we would like to ask you a few questions about the

country Morocco. What comes to your mind when you think about the country Morocco?' To understand the perceived differences and similarities between the Moroccans living in the Netherlands and the Moroccan people living in Morocco in order to assess their impacts on destination visitation, we asked: 'In what ways do you think the Moroccans living in the Netherlands are different from or similar to the Moroccans living in Morocco?' The interviews were type recorded. Data were grouped and analysed according to the four objectives.

The interviews were supplemented with a content analysis of print promotion and advertising material to assess whether there is congruity between the perceived and the projected image of Morocco as a tourism destination. The images of the campaign were the basis of the analysis. We have gathered travel brochures advertising Morocco from several travel agencies located in the Netherlands. The pictures in the brochures were cut and amounted to a total of 465 pictures. These pictures were subdivided into four respective themes, namely nature, culture, hospitality and facilities, and geography. The themes and motives have been expressed in the form of percentages related to the total number of pictures and percentages of pictures within the specified theme.

Findings

Image that the Dutch have of the Moroccan community living in the Netherlands

How do the Dutch perceive the Moroccans living in the Netherlands? We found the Dutch perception to be more negative than positive. The most common descriptors offered by respondents are summarized in Fig. 7.3. The themes that are apparent in all our interviews can be summarized in the four core themes: criminality, religion, integration, and media.

There are too many Moroccans in Holland
They are not able to integrate in the Dutch
    society
They create problems
They have large families and low income
They have low education and problems with
    the Dutch laws
They do not respect Dutch laws
They are torn between tradition and modernity
They are annoying
They take advantage of the welfare state
They don't like opinionated women
They have a different religion
They are criminals or inclined to criminality
They are aggressive
They are lazy
They sell drugs
They are not controlled by parents

Fig. 7.3. Descriptors of the Moroccans living in the Netherlands.

These descriptors have been captured from sentences such as the following:

Criminality and bad behaviour

'I think there are too many immigrants, they are just enjoying our wealth' (D. Landman).

'They are discriminated in some ways. Nevertheless, they all have their problems and create problems' (J. Lopes).

'Sometimes I feel a little uncomfortable when I am walking alongside a group of Moroccans or Surinamese' (A. Boorsma).

'The Moroccans living in the Netherlands are most often criminals' (L. Rosario).

'Moroccans in the Netherlands are more aggressive and annoying' (M. Verkerck).

'Selling drugs and participating in other inappropriate manner is done by them all' (M. Verkerck).

'Moroccans are often associated with burglaries, rapes, unemployment and forced marriages' (T. Hoogeveen).

'The Maroc boy, children and the Maroc young people they are the, yeah sometimes they are very criminal' (Visser).

'The maroc the young Maroc people are not so, they make their country look quite bad .... because the bad uh behaviour of many Maroc people here' (Visser).

'I think that the Moroccan youth living in the Netherlands is less disciplined by the Moroccan community than when they would live in Morocco. I think that here they are given more freedom to do bad things, and I think that is less in Morocco' (H. Verheide).

'Turkish live more among themselves I think, you do not notice much of them. If there is a problem, like a fight within the family, they solve it inside the house. With Moroccans I do not know, they only walk on the streets screaming at each other' (H. Verheider).

'You have for example youth groups who try to ruin everything, I once experienced this, young Moroccans against young Antilleans, a fistfight on live and dead. But I think that the parents of those Moroccans do not like this, only they do not have any control on the situation. And I think that that is the biggest problem. I believe that in particular the Moroccan parents want to find a solution' (D. Landman).

'In many occasions the youth has a very big mouth at school and at home' (M. Verkerck)

'Young immigrants don't show any respect to anyone at all' (D. Landman).

'They represent most of the criminals in The Netherlands' (M. Verkerck).

'They do not repel the Dutch culture as much as the Turkish and Moroccans do' (M. Braafhart).

'Moroccans in Holland seem to be unhappy with their situation. They want everything to be as it is home but that is not even the case in the whole country' (L. Brugman).

'Moroccans are those little plague boys who ruin everything' (L. Brugman).

Education and unemployment

'Their income is often low' (A. Westenbrink).

'A lot of the Moroccan boys/men in the Netherlands do not have a job or are on welfare pay check which is not possible in Morocco' (H. Verheide).

'They do not have a high education: it is often VMBO. This is because they cannot speak the language fluently and already on the primary school they will get a delay in learning' (A. Westenbrink 2005).

'These immigrants are most often criminals that do not want to have a job or school' (L. Rosario).

'It is difficult for them to adjust to the Dutch standards and values, and it is harder for them to find a job, or follow a good education' (A. Boorsma).

Religion

'Also are the Moroccans stronger attached to their religion' (T. Hoogevee).

'The religion in Morocco has more influence on the daily live than here in Holland' (T. Hoogeveen).

'They are religious' (C. Jaski).

'They come from Muslim country, Islamic country' (Visser).

'Uh, the first thing that comes to mind is actually eh yes, long veils' (de Boer).

'And also I think their faith is still very important it doesn't matter where they live. I also think that the Moroccans living in Morocco are much more strict especially regarding living their life according to the Koran' (D. Verheide).

'But I do find it very important that those people respect our religion, laws and lifestyle' (L.Brugman).

'The Islam is important to the Moroccans' (A. Westenbrin).

'They are now known for not doing anything, especially many elderly people cannot talk good Dutch or do not talk at all. I still think that these people come from a decent family, don't understand me wrong, but the Islamic law is a big problem' (M. Verkerck).

Integration

'If they are here with the right intentions, its OK, but if they are just here to kick trouble heheh…lets kick them back…'.

'I don't have any problems with immigrants, provided that they adjust themselves and make use of the possibilities that are available to them'.

'Sometimes the old family that came here for the reason for making money and then go back uhm stay here but didn't develop the right way to do not speak good Dutch or whatever uhm.. and their children here living two lives because they are not real Moroccan people and they are not real Dutch and then they go lost and for them it is very hard to live uhm the 'right' life because they won't fit in here and they won't fit in there… so it is very hard for them…' (A. Boorsma).

'They have those attires and all that kind of stuff and they have a big family with lots of children' (J. Scholten).

'I think that you have two types; the older generation is still very traditional and the younger generation can again be subdivided into two types. One of them is pending between two cultures and the newer generation is somewhat more westernised is currently studying and understands that they have to put in an effort to reach goals and see that being on the government's pay check is not the way to make a good living for yourself' (H. Verheide).

'The Moroccans are harder. They do not wish to respect our culture' (L. Brugman).

'I think it is quite hard to mix their culture with the Dutch culture. Dutch people are generally very liberal and the Moroccans seem to find that hard' (Robert).

'They just also have to keep them to the Dutch law' (W. Aukes).

'I do not see a clear difference. It's often the Turkish and Moroccans [who have problems]. Not really the Surinames in the Netherlands' (C. Jaski).

'More conservative Moroccans emigrate to the Netherlands' (M. Braafhart 2005).

'They [Surinamese] do not repel the Dutch culture as much as the Turkish and Moroccans do' (M. Braafhart).

'As long as they behave in the society they wouldn't be a problem' (P. Heezeman).

'They do not have the standards and values of the Netherlands: although their family is very important, it is not like they are going every Sunday to their grandparents' (A. Westenbrink).

Surinamese and Antilleans are more involved in the Dutch culture and tend to stay there after they moved out of Surinam or the Netherlands Antilles. Turkish and Moroccans come to the Netherlands to work there for 5 years and then go back to their own country. They cause more problems when they have to adapt (M. Braafhart).

'Most of them are not able to integrate in the Dutch culture. Some immigrants don't speak the Dutch language at all after a couple of years for example' (D. Landman).

'So when emigrating to Holland, Moroccans still keep their own standards and values' (M. Braafhar).

'Some immigrants are adjusting very well to the Dutch culture, some Moroccans are adjusting well to the Dutch society, for some Moroccans life should go exactly

as they want it to go and not different, and some Moroccans do not adjust properly and are very strict in their own beliefs' (J. Scholten).

Media

Although most of our respondents hold negative perceptions of the Moroccan community, there is an explicit agreement that their perceptions are also shaped by a sort of asymmetrical media coverage of the Moroccans in the Netherlands.

'They (Dutch) think bad over Moroccans, many do' (J. Lopes).

'The occurrences between Moroccan and Dutch people make (Dutch) citizens even more suspicious. It is mainly that on one side they try to promote while on the other side, with the news, they put Morocco down again. This creates a confusing feeling around people but not a safe feeling' (J. Lopes).

'But because Moroccans are not very loved in the Netherlands, there may not be plenty of Dutch families that will choose for a vacation in Morocco' (L. Rosario, 2006).

'Is the image mainly shaped by TV and newspapers?' (W. Aukes).

'However, the Moroccan youth is often on the news and in papers [for bad news]' (W. Aukes).

'They are in the news because of crime or criminality' (C. Jaski).

'Also not that positive, mainly the Moroccans and Turkish are in the news, with crime and criminality. My image of them has been created by that, because we live in a small town, it differs of course with those who live in a city. Here hardly live any Moroccans, so it is mainly through the news messages' (C. Jaski).

'Yes, I think so. The news plays a role' (de Jong).

'Because there are many other nationalities in Holland but you never hear anything about them, you never hear some bad stories about Chinese or yeah other [but about Moroccans]' (Visser).

'I don't have a problem with that, with no culture whatsoever, but, certain things come forward, mostly negative things and then the country doesn't come out looking very positive. Like the word 'Moroccan', which I don't have a problem with, with no one, but Morocco comes out negatively, it does' (de Boer).

'In the media you have two kinds of women; the real Muslims who devote their lives to Allah and his beliefs and the women who want to live like Dutch women. What you see in the media further is that they are criminals and no good. I'm not saying that I agree with this image but that is what I hear on television and in newspapers' (H. Verheide).

'I think that they are shown in the media more negative than other groups in our society' (H. Verheide).

'I believe the Moroccans are represented negatively in the news. I believe this is also done to give people a group that they can take their frustrations out on. The black sheeps as one could say' (H. Verheide).

Image that the Dutch have of the country Morocco

The most common themes that emerged throughout our interviews with regards to what people think of the country Morocco are: women's oppression, poverty and underdevelopment. However, the most striking theme that was apparent in almost all of the interviews was the lack of knowledge of Moroccan culture.

Lack of knowledge of the Moroccan culture
Most of the respondents indicated clearly that they did not know much about Morocco. Most of what they know is based on their perception of the Moroccans living in the Netherlands. For example one respondent indicated:

'I don't really know, because I'm not that interested in the country. But I feel it is a country with strong community relationships, spending a lot of time with each other, living together, etc. And I think there is still a culture of the man is working and the woman is at home taking care of the children and doesn't really have a word in the household. I don't know if this is correct, but this is the feeling I have' (Robert).

Another respondents says:
'euh.. yes, Moroccans haha.. well, actually I don't think of something else. I don't have an idea about that [Morocco], I have been in Tunisia once, I think it is comparable. But once again, my image of Moroccans living in the Netherlands is very negative, so this might influence my idea about Morocco as a country as well.'

Another one says: 'Just as I said, I don't know a lot about Morocco. For that reason it is very hard to create an image about its culture, habits, nature, etc.' (J. Lopes).

Another one could only think of the Moroccans going on vacation to Morocco: 'Little vans on the highway in the summer with all the people going that way, with lots of families, and I don't know there is nothing I know about that country' (C. Jaski).

Women's oppression
A number of respondents related the condition of women in Morocco to the image that they have in mind when they think of the country. There seems to be a general consensus that the women are oppressed by the Moroccan law and culture.

'It is very difficult for women to really mean something…They are always oppressed by their man and the government even helps' (L. Rosario).

'They [Moroccans] are being oppressed, especially the women' (J. Scholten).

'Especially for women it is not a good country to live in, they are being oppressed. The role of the women is that in Morocco they are being oppressed by their husbands' (Westenbrink).

'The women are not appreciated' (M. Verkerck).

'Women have less to say and 'in te brengen' mainly in Morocco… and the women not count for them' (T. Hoogeveen).

'Cause I sometimes hear also that the maroc the women are treated quite badly and quite strict by their husband, so that's why I think Tunisia is a better destination' (Visser).

'women in burkas' (Visser) and 'headscarves' (J. Scholten).

'I also think about having to wear a head scarf and your freedom being limited' (D. Verheide).

'Woman's lives mainly take place inside the home both in Morocco as well as in The Netherlands' (H. Verheide).

'That the men don't like strong and opinionated women. They respond very strangely to them' (H. Verheide).

'I however believe that the Moroccan girls have fewer privileges than the Moroccan boys. I feel they are not treated equally' (D. Verheide).

'That the women are repressed by the men' (C.Jaski).

'Virgin Muslim girls are not allowed to marry, for example, Dutch boys' (Robert).

'the culture in which women are very inferior persons, suppression of women, yes, that's what comes to my mind, the men culture' (Respondent X).

'And I think there is still a culture of the man is working and the woman is at home taking care of the children and doesn't really have a word in the household. I don't know if this is correct, but this is the feeling I have' (Respondent Y).

'I hope they have became a bit more western, ya the Turkish here are sometimes behind in time…because they stick to their culture, while the country itself [Turkey] went on so. I don't know about Morocco. Or some [Moroccans] do have become more western and do take into consideration the woman and that this does not happen in Morocco' (Respondent Z).

'Women have more disadvantages than men, since men can go to school and only some of women have the benefit of education' (Respondent X).

'The sexual relations in Morocco are not accepted before the marriage, if it happens the woman doesn't have a future' (Respondent X).
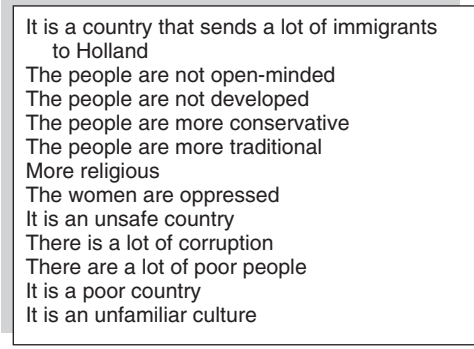
'Female prostitution and homosexuality is not allowed' (Hargraves).

'The public places are the place of the men and the house is the space of everybody and where you can define relationships' (Hargraves).

'The culture in which women are very inferior persons' (Respondent W).

'Suppression of women, yes, that's what comes to my mind, the men culture' (Respondent W).

The perceptions that the Dutch have of the Moroccans living in Morocco is more negative than their perceptions of the Moroccans living the Netherlands. The image that they have of the country Morocco is negatively affected by perceptions of democracy, Islam, fundamentalism, poverty, and women's conditions. These perceptions form the stereotypes described in Fig. 7.4.

It is a country that sends a lot of immigrants
   to Holland
The people are not open-minded
The people are not developed
The people are more conservative
The people are more traditional
More religious
The women are oppressed
It is an unsafe country
There is a lot of corruption
There are a lot of poor people
It is a poor country
It is an unfamiliar culture

Fig. 7.4. Descriptors of Morocco and Moroccans living in Morocco.

The above mentioned descriptors have been captured (directly or indirectly) in sentences like the following:

'A country that still brings a lot of immigrants to the Netherlands' (L. Brugman).

'They try to imitate European standards when they return or visit their home country. It is particularly a good sign because it makes the Moroccans not to follow the most extremes within their religion and traditions' (J. Lopes).

'When Moroccan people come to Europe their minds become more open' (J. Lopes).

'From this new society they take examples and realize that some of the ways in which they have been living before were not the best ones, after they have seen that the new society has better ways of living or ways that are already more developed than their own' (J. Lopes).

'I think Moroccans that are living in the Netherlands are much more modernised than the Moroccans living in Morocco, in for instance the mountain areas' (D. Verheide).

Projected and perceived image of Morocco as a tourism destination

The projected image is that which is constructed by tourism officials and promoted in the tourism literature and communication campaigns. The perceived image is the image that potential tourists have acquired from internal as well as external communication sources. It is the image that they have in their minds. The results are based on a content analysis of 465 pictures in brochures and travel magazines from several travel agencies located in the Netherlands (Fig. 7.5). We found congruity between the perceived and the projected image. When people think of Morocco as a tourism destination, the most common destination attributes that come to their minds are culture and nature related. The tourism industry also positions culture and nature at the core front of the country's tourism product communication, besides its hospitality and accommodation facilities. (The general focus of this paper does not allow for a detailed

picture of the content analysis.) However, of the 46 respondents less than one-quarter indicated that they have seen an advertisement about Morocco. Of these, only three could recall its source and content. This suggests that (a) Morocco is not aggressively advertised/promoted in the Netherlands, and (b) the existing campaign is not strong enough to exert an impression on people.

An issue related to marketing and its weak aspects is related to confusion with competition. Several respondents indicated that they could not tell whether the images they had seen were of Tunisia, Turkey or Morocco. Nevertheless, the image that respondents have of Morocco as a tourism destination is positive. When asked: 'what comes to your mind when you think of Morocco as a tourism destination?', the overwhelming majority sited 'fabrics', 'spices', 'temples', 'buildings', 'Berbers', 'markets', 'colourful people', 'sun', 'hot weather', and 'nice old cities'. This again matches the positioning statement 'A Feast for the Senses' that has been promoted by the industry.

The other aspect is related to future visitation. Most respondents do not show an interest in visiting Morocco in the near future. This has been captured in their destination visitation choice. They are more likely to visit Morocco only after having visited Turkey and Tunisia.

Discussion and Recommendations

The results, constructed based on our interviews, regarding the research objectives can be summarized as follows:

(1) The image that the Dutch have of the country Morocco is negative.
(2) The image that the Dutch have of the Moroccan community living in the Netherlands is negative, but less negative than the image they have of the Moroccans living in Morocco.
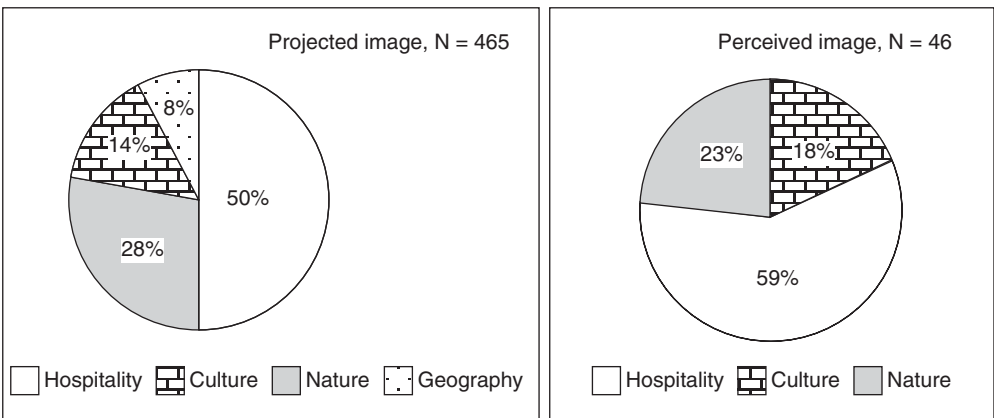
Fig. 7.5. Comparing projected image with perceived image.

(3) The perceived image of Morocco as a tourism destination for the Dutch tourist is positive, and congruent with the projected image; yet weak and confused with competition.

(4) The Dutch potential tourist seems to have knowledge of and appreciation for the tourism-tangible attributes of Morocco, and seems to lack knowledge of and, therefore, have a negative perception of the intangible attributes that are associated with the Moroccan people and the country's socio-political progress.

A body without soul

Although Morocco offers a 'superb' and diversified tourism product, it has not been favourably positioned in the minds of potential Dutch tourists.

> Most destinations have superb five-star resorts and attractions, every country claims a unique culture, landscape and heritage, each place describes itself as having the friendliest people, and high standards of customer service and facilities are now expected (Morgan and Pritchard, 2004: 60).

Important as they may be in affecting destination choice, these discernible tangible benefits are but the body that every country can claim to have; what Dutch tourists seem to be missing in Morocco's tourism, or rather what Morocco does not seem to be projecting is its soul: that emotional appeal that goes beyond the perishables. In fact, as has been concluded, the perception of Morocco as a tourism destination (the body) is healthy, but the perception that the Dutch tourist holds of the Moroccans (the soul) is sick. As is revealed in our interviews, the problems with Morocco are related to the negative perceptions, stereotypes and misconceptions that the Dutch hold of the Dutch-Moroccan community, and the people in Morocco. Most respondents have also explicitly indicated their concerns and unwillingness to visit the country. The challenge of tourism stakeholders is to develop positive perceptions in the minds of potential tourists. Favourable perceptions not only affect destination choice greatly (Goodrich, 1978) but also enhance positive social interaction between hosts and guests and cross-cultural behaviour and understanding in tourism (Reisinger and Turner, 2003).

To win the hearts and minds of the Dutch tourists, Morocco needs to intellectualize its tourism communication campaigns. There is a need to concentrate less on the country's traditional tangible tourism attributes and more on projecting the country's modern attributes and sociocultural realities. What attracts the French tourist to Morocco may not necessarily pull the Dutch tourist. Thus, Morocco needs to tailor-make their marketing campaigns. 'To be successful in the tourism industry a country must be very specific about what it wants to market and to whom' (Kotler and Gertner, 2004: 48). Because of the overwhelming negative perceptions and stereotypes of the Moroccan community in the Netherlands, there is a strong need for the handling of negative events and media stories within the tourism communication (Pigott *et al.*, 2004: 209).

What the Dutch tourist wants and needs to see is a progressive marketing campaign based on the true progressive social and political changes that are

taking place in Morocco. Needless to say, the Morocco of the 1970s, including things and people, is not the same as today's Morocco, and need not be positioned in the minds of potential tourists as such. Lack of communication may nurture negative perceptions and stereotypes, which in turn strengthen the perceptual borders. To be successful, destinations need to be emotionally appealing. As has been noted, 'the battle for consumers in tomorrow's destination market place will be fought not over price but over hearts and minds, and this is how places have moved into territories previously reserved for consumer brands' (Morgan and Pritchard, 2004: 61).

In summary, there is a need to (a) intellectualize Morocco's tourism communication, (b) romanticize Morocco's marketing campaigns, (c) shift from destination selling to destination branding, and (d) deliver the bundle of the intangible attributes that are valued by the target market. In a highly competitive and dynamic global tourism environment, there is a need to develop a clear identity based on emotions. There is a need to concentrate on conveying the essence or the spirit of Morocco to change existing perceptions and misconceptions of the country and its people. To conclude, based on our research and the 21st century's realities, e.g. disparity between the haves and the have nots, terrorism, fundamentalism, civil unrest, prejudice, discrimination, and home-grown terror, it becomes difficult to dissociate immigration from travel propensity and destination choice. It is also myopic to assume that immigration does not mirror, justly or unjustly, both the immigrants' receiving country and the immigrants' generating country. We thus propose that for tourism to grow in a dominantly Islamic developing country there is a need to supplement tourism pictures with words of wisdom, accountability and transparency. If, as has been supported, the new tourist is more demanding, perhaps s/he has also become more critical and concerned. And Morocco's tourism can use, promote, and benefit from the country's emerging progressive policies and sociocultural changes. For example, words of wisdom could be based on the descriptors that are advanced in Fig. 7.4.

This means, there is more to tourism than to promote tourism. There is a need for nation branding. The promotion of tourism is only a part of the whole (Anhol, 2004). The willingness of tourists to visit a destination is determined by the (real or unreal) borders that lie between the destination and country of origin.

According to Timothy and Tosun, there are two borders that keep people out of a country: real borders (e.g. visa requirements) and the perceptual borders that are felt by a person (e.g. extent of cultural similarities between both destinations). Important perceptual borders in a borderless communication century are negative perceptions and stereotypes. These borders may be seen not as a weakness but as an opportunity. Tourism, as an agent of peace, brings people from different countries and cultures together (e.g. Hedgell, 1999). 'Tourism can help overcome many real prejudices, and foster new bonds of fraternity. In this sense tourism has become a real force for world peace' (Pope John Paul II). From a perceptions and stereotypes perspective, we could argue that tourism, as a 'checks and balances' agent, has the potential to bring positive reforms within a country.

For tourism to grow, policy makers would have to deliver and communicate the bundle of subjective attributes (socio-political progresses) that are valued by

the target market. In abstract terms, since there are (almost) no laws in cross-cultural hospitality, hospitality must constantly be renegotiated (Rosello, 2001) and so must the image of a destination. Destination images are influenced by traditional attributes, but also by how the people (nationals) are perceived by the target market. Perceptions are important because they can help to predict travel propensity, destination choice, host/guest encounters, and cross-cultural understanding. More importantly, however, is that they can be detected and corrected (Reisinger and Turner, 2003). Perceptions can be corrected, and misconceptions overcome, through 'people branding', a concept proposed in the upcoming discussion. The nation brand is the sum of the perceptions of the country and its people (The Anholt Nation Brands Index, 2006).

People branding

Most recently, tourism marketers have used the concept of branding to sharpen the images of destinations, countries, cities, or even places. Market conditions, influenced by bad news, global or local crises, present a challenge even to the most winning brands. Thus, 'even the most successful brands have to evolve' (Morgan and Pritchard, 2004). On the other hand, good news presents an opportunity even to the least successful brands, to communicate messages about identity, culture, and social-economic achievements. In the context of the interplay of immigration, 'hospitality', tourism, and social or asocial encounters between immigrants and natives, there seems to be an urgent need for 'people branding' ('people' is also a factor in Simon Anholt's brand hexagon). Morocco is perceived positively as a tourism destination. Its traditional tourism attributes 'e.g. sea, sun, imperial cities, colours and spices – are appreciated by the potential Dutch tourist. However, 'Blue skies and golden sands or snow-capped mountains are only a tiny part of the reality of a country' (The Anholt Nation Brands Index, 2006: 3).

On the other hand, the image of Morocco as a country is lagging behind, because it is perceived as economically poor, and socially disabled (see Figs 7.3 and 7.4). The opportunity for the country to positively reposition itself in the mind of the potential tourist lies in its most recent socio-political achievements, and the ones that are planned ahead. These need to be better communicated by the country's public relations, and the other media venues. Marketers need to shift from destination selling to destination marketing. Communicating Morocco's achievements will support the existing advertising campaigns, and add value to the country's image.

Like brands, people do evolve as well. Like brands, people, too, are challenged by bad news and local or global crises. In an attempt to address negative perceptions, people branding suggests a balance between reality and perceptions. How people are is not necessarily how they are being perceived. People branding starts with asking the questions: who am I, how am I perceived by others, and what can help me achieve the most desirable position in the minds of others? Answers to these questions may help reduce perceptual borders, change perceptions, and correct misconceptions.

In the Morocco case, for a successful people branding, there is a need for an integrated communication between the industry, marketers, politicians, policy makers, behavioural scientists, the media, and the local communities. Their respective perspectives and related recommendations can help answer the people branding questions, thereby, contributing to a successful tourism positioning.

Successful tourism positioning can happen when the traditional attributes of a destination are positively perceived, and the socio-political progresses well communicated, adequately transmitted, and well received by the target market. It is important to emphasize that 'I [also] find it inconceivable that any country can change the way the world views it as a whole purely through marketing communications and forms of deliberate propaganda' (The Anholt Nation Brands Index, 2006: 3). Hence, to change negative feelings and to influence the country's reputation in a positive and sustainable direction, there is a need for good governance based on objectivity and transparency. 'Regardless of how many good things a country has to offer, these will be wasted if the target group does not see, hear or experience them' [Secretariat Ministry of Economic and Business Affairs (SMEBA: *Proactive global promotion of Denmark*, 2006: 6)]. People branding contributes to the branding of the whole nation. ''Nation branding' is basically a matter of building, refining and maintaining a country or nation's reputation (….) A reputation cannot be constructed: it has to be *earned*' (The Anholt Nation Brands Index, 2006: 6) and it must reflect reality as well; for a 'reputation that is not grounded in reality will not be credible, and the target group will see through it sooner or later, after which more harm than good will have been done' (SMEBA, 2006: 6).

In addition, people branding is proposed as a factor that can help to reduce the tension of culture unrest. As suggested earlier, culture unrest has been defined as a context where two communities live together but where harmony between them is lacking or minimized. As the contexts of immigration are changing, the rules of hospitality in immigration necessitate adjustments as well. The metaphor of the immigrant as a guest (Rosello, 2001) does not apply to the new realities of the world we live in. The reality is that culture unrest is a combination of perceptions, reality, and failed policies. These and similar factors generate xenophobic actions and reactions, animosity, or even racism.

As has been empirically verified, the reputation of the Moroccans living in the Netherlands is far from good. All other things being equal, of course, it is needless to argue that both allochthon and autochthon communities have a share in the building of culture unrest in the Netherlands. In the context of people branding, from the perspective of the allochthon community, there is the belief that culture unrest may change into culture understanding and appreciation when the reputation of the allochthon is adjusted, rejuvenated, and enhanced. A good reputation gives the owner a number of tangible advantages, including competitive advantage, sound relations with others, sound business reputation, positive influence on others, increased investment, enhanced tourism, enhanced partner cooperation, significant political resource, international negotiations, filling top international posts and an appreciation of the country's nationals when they travel to other countries (SMEBA, 2006). In the case of the Dutch

Moroccans, a good and credible reputation will also enhance, adjust, and rejuvenate their image in Dutch society as well as outside its border.

However, a reputation does not change overnight. The Moroccan government needs to be more concerned about the international image that its citizens have, and more in-depth studies need to be undertaken to influence the country's reputation in a positive way. The reputation of the Moroccan people does not do justice to the cultural and natural heritage of the nation, and to its progressive social-political achievements. It is time for the government, including tourism officials and tourism marketers, to undertake a comprehensive branding campaign, communicate it, and monitor its progress and impacts. Failure to do so may very likely continue contaminating other areas of life, including tourism.

Tourism racism

Similar to consumer racism (Ouellet 2007) and its effect on buyer behaviour, it is very unlikely that a person who is 'racist' or who has developed a phobia against some immigrant community at home would travel to the country of origin of these people to enjoy the tourism product. As Rosello (2001: 3) puts it: 'And I suspect that people who perceive their own cherished homeland as threatened by herds of dangerous foreigners' would not want to encounter those herds somewhere else, or visit them and their brothers and sisters in their country of origin. Put differently, based on the consumer racism (CR) concept (Ouellet, 2007) and its analogy with postcolonial hospitality (Rosello, 2001) and tourism diaspora (Stephenson, 2004), I propose tourism racism (TR) as an important concept to be included in the study of destination image. Drawing from Ouellet's definition of CR, TR may be defined as the antipathy towards a given immigrant minority's behaviours and attitudes and the perceptions related to their country of origin as a symbolic way of discriminating against tourism to that country – affecting consumer behaviour in the international tourism marketplace.

Perceptions are defined as 'the impressions people form of one another and how interpretations are made concerning the behaviour of others' (Hargie, 1986: 47). First impressions are particularly important because they decide whether or not one associates with others (Reisinger and Turner, 2003). The complexity and importance of perceptions lies in the fact that mostly, if not always, these start at home and not at the destination. People already have first hand perceptions of a destination prior to its visitation. While tourism perceptions are formed at home through channels including education, media, and marketing communication, it is believed in the present study that the perceptions that potential tourists have of immigrants and their country of origin have an important effect on the propensity to travel to that country. In this case, the guest (or potential tourist) is first a host at home then a guest at destination. The host (or immigrant) is first a guest at the receiving country then a (indirect) host at country of origin. This complexity begs for the study of destination images to be revisited (Fig. 7.6). Urry (2000: 36) explains that the 'scapes and
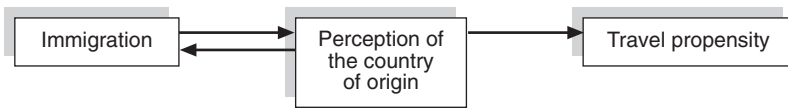
Fig. 7.6. Destination image revisted: immigration's effect on perception and destination choice.

flows' of the 21st century 'generate new opportunities and desires, as well as new risks'. Similarly, as tourism shapes wider societal processes, host or guest – people in whatever space – they both have the power to shape the tourism and hospitality environments.

Finally, adding a good reputation as a people to the other existing natural and cultural resources with which a nation is endowed would help to forge a positive image. As has been acknowledged (e.g. Freire, 2005), a good reputation is not a creation of clever entrepreneurs, but it is a result of positive and progressive changes in society. For a country to maintain or forge a good reputation (or brand), there is a need to ask: (a) Who are we as a nation? (b) What do we want to become? (c) How are we perceived by others? (d) How do we believe others perceive us? These and similar questions can help to assess the reputation of a country, detect where the discrepancies are buried, and work on insuring that the target market has a clear and positive picture of the country.

Suggestions for Further Research

As we have learned from Rosello (2001: 172): 'The host and the guest are often locked in a complicated ballet of proposals, expectations, careful interpretations of seemingly infinite offers'. If we support the thesis that immigration has an effect on tourism propensity, it remains important, as well, to assess whether the perceptions of the host/immigration receiving country held by the immigrant community have an effect on the perceptions that the immigration generating country (the host tourism destination) have of the guest/tourist. Perhaps, it is also true in the 21st century that, as Homer in the 9th century B.C. said in *The Odyssey*: 'A guest never forgets a host who has treated him kindly!' In other words, it is worth investigating the extent to which culture unrest might have an effect on tourism hospitality and tourist satisfaction.

The other suggestion would be to replicate this study in a different context, using the conceptual model proposed in Fig. 7.2. For example, since Turkey is one of the hot spot tourism destinations for the Dutch tourist, it may be insightful to examine how the Dutch perceive Turkey as a tourism destination, and how this perception affects tourism visitation. The next suggestion is to undertake a comprehensive branding study to develop a winning branding campaign for Morocco to attract the Dutch market.

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8 The Demand of Rural Tourism in a Natural Park in Southern Spain

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Introduction

Rural tourism is a tool to enhance regional development, especially where there are socio-economic unbalances. In Spain, rural areas with low levels of income and productivity still prevail. Generally, they focus their production on economic activities directly related to the primary sector and they have high rates of unemployment. It is necessary to promote income diversification.

These regions need a sustainable growth model through an economic culture based on efficient administration of the rural resources, with the involvement of the population whose main aim should be the search for a socio-economic and environmental balance. Rural tourism provides additional income and stable employment. Also it contributes to the reduction of poverty and to income redistribution. We do not consider that tourism will be the main source of income in these regions, but we think it could be an additional income contribution for inhabitants.

If a tourist wishes to stay in contact with the natural environment, he or she is inclined to go for rural tourism where they will be in contact with the natural environment and not for a traditional type of tourism, i.e. a beach holiday. This type of tourism does not satisfy the requirements of modern tourists for whom the environment is one of the major causes for concern. The ideal of sustainable development is as important to some as being in contact with nature or cohabitation with the family; rural tourism becomes an emerging tourism. This tourism satisfies the needs that the tourist consumer has nowadays. A niche market has appeared due to this change in the values of the current tourist consumer. Rural areas can take advantage of this niche to generate additional income.

Tourism as Generator of Wealth in Rural Areas

Although our research deals with rural tourism, we are not going to expand on a complex definition of the term. Different experts in the field take rural tourism to mean different things so that, even nowadays, there is no unanimous definition. In fact, the term has different meanings in different countries. This first one by Traverso (1996) says: 'the tourist activity of sustainable establishment in the rural environment', and the second definition, by Blanco and Benayas (1994), says:

> a singular expression of the new ways of tourism, characterized by: (a) being developed out of urban settlements, (b) being generally produced in a reduced way in wide places, (c) using diversely some resources characteristic of the rural environment such as natural, cultural resources, (d) contributing to the local development and to the tourist diversification and competitiveness.

Rural tourism represents a key component in the socio-economic development in the regions. It makes it possible to diversify the income of the rural population to guarantee a prosperous development of the region, so it proposes an activity that will generate additional income and an element that distributes that income.

Inland areas have to be conscious of the opportunity that has emerged, and they have to take advantage of the gap in the market, as everyone should be aware of the new interest in this type of tourism from the consumer in recent decades. There has been strong interest in sports, cultural and gastronomic activities in a rural environment.

Multiple factors have to take into account the change in the tourist consumer's values and habits, and it is essential to know the profile of the consumer of this tourism so as to offer a specialized product that is adapted to the tourist's needs.

Rural tourism is an economic factor with some features that make it special. This tourism is carried out with more periodicity, decreasing the typical seasonal nature of this area, an area of a great importance from an economic point of view. This is mainly because the created employment will not have to be temporary, as is the majority of employment created by tourism (Fig. 8.1). Tourism has a multiplying effect in the population of these rural areas. It diversifies the obtained income; it decreases the dependence on the primary sector and reduces the economic risk which it entails. So, rural tourism will help to redistribute the income between regions, and it will encourage the creation of employment directly, employment destined to produce tourist services. At the same time, it creates indirect employment destined to get the raw materials needed for the production of properties and goods and services consumed by the tourists.

At the same time, the establishment of tourist activity in rural areas may be an element, according to other areas. There is an exodus to urban areas on the part of the population. Equally, this tourism will help to decrease the high rates of unemployment. These are the main difficulties that these societies are suffering in the development of rural tourism.

The development of rural tourism does not mean that tourism is likely to become the main source of income in these areas; on the contrary, it is a source
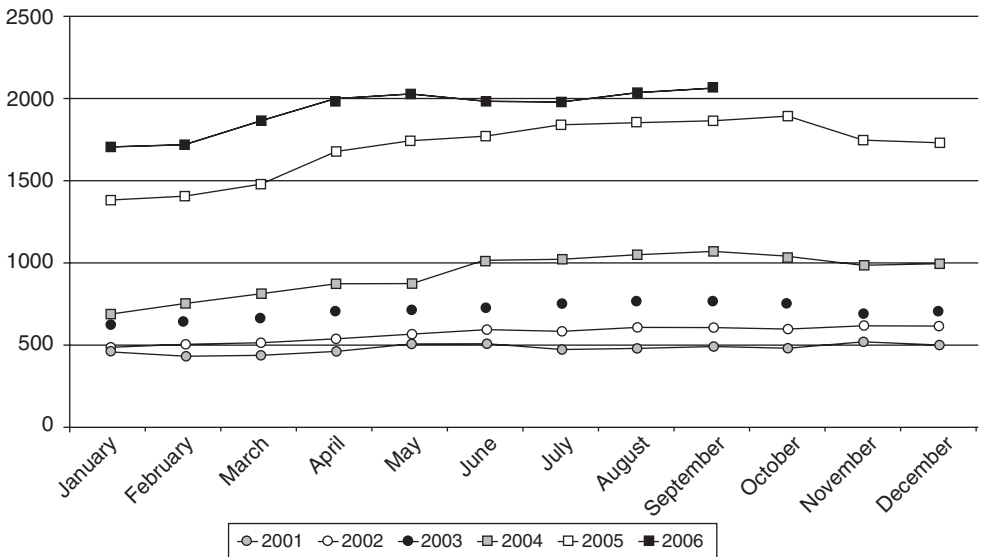
Fig. 8.1. Staff employed in rural tourism in Andalusia.

of additional income for the inhabitants. If this situation was to arise, i.e. with tourism becoming the main source of income for inhabitants of rural areas, it would entail a high probability of saturation in the rural areas. And, it is hoped to promote the sustainable progress of the environment to generate wealth and employment in the course of time. So, the maintenance and conservation of the environment will promote a respectful tourist development with the natural and cultural environment. It is essential to avoid the saturation of rural tourist centres such as Arroyo Frío in the province of Granada.

Cooperation, dialogue and coordination of the different socio-economic factors and institutions (local, regional and supranational) involved in rural tourism development are essential. Of course, the participation of the people is a vital factor in order to increase associations between towns. One of the main issues is increasing the public's awareness of the existence of a potential in the region to exploit. It is necessary to increase the commitment of inhabitants in the region in tourism matters, because they will be the ones to benefit most. Equally, the public institutions should promote development plans to make tourist activity easier in these regions. Although the growth of every region has to be motivated from that region itself, we should consider the resources and possibilities of the area and we have to boost them to offer a product which satisfies tourist consumer's needs fully.

Tourist activity will not cancel out agricultural activity but it will help to correct regional imbalances. Small growers and family farms will be able to benefit from a higher involvement of society in this sector, so the union of synergies between public and private institutions will be a fact.

However, rural tourism will also spark off negative effects in these areas; in the long term the cost of living will increase and agricultural areas will decrease.

Due to all of these factors, effective and efficient planning and running of all the regional resources will be necessary to ensure that tourist destinations are not flooded with visitors, otherwise they will lose all their charm.

Rural Tourism: Essential to Know the Factors Influencing Demand

Rural tourism is an emerging sector in Andalusia but 'sun and sea tourism' is, of course, the main source of income. The appearance of new types of tourism due to the demand of tourist consumers has introduced gaps in the market. The search for new sensations (adventure, historical places, new experiences, etc.) has produced changes in the consumer's behaviour; they are the reasons for the new tourism possibilities in rural areas: (a) the reversal of population pyramid; (b) the change in the role of women who, now demand quality leisure time; (c) habits and values of the population have changed; (d) the quality of life of the population has increased; (e) equally, a rise of the available income levels has been produced; (f) there has been a rise in free time thanks to workers' retirement at an earlier age, and an increase in flexibility in some aspects of the work market: e.g. paid holidays and a reduction in the length of the working day. All of these factors have contributed to the development of an important industry related to free time, which is tourism.

At this point, we will show the results obtained in the analysis of two research projects. The first was done in Andalusia. We can see the consumer profile of rural tourism in this region. In the second, data obtained from three natural parks in Cordoba were analysed, showing the level of satisfaction that the tourists got after their stay in the area.

This research was necessary because there is an urgent need to know motivations and attributes that lead the consumer to take part in this type of tourism. We have to take into account the current demand, in order to take all the necessary steps to satisfy their changing needs. To sum up, knowing their profile and offering an adequate product.

The Demand of Rural Tourism in Andalusia

To determine the features of the demand for rural tourism in Andalusia, a survey of 1200 individuals was taken during November and December 2003 and from January to June 2004 in the eight provinces of Andalusia. They were segmented according to the percentage of population, with 1017 inquiries validated, with a reliability level of 98% and a 2% margin of error. The data processing of the survey and the design of the econometric model were done using the computer tools SSPS and EVIEWS. The results obtained were as follows:

(a) In Andalusia, supply is inadequate with most accommodation focused in the areas close to the 24 natural parks in this region (Fig. 8.2). About 30% of the accommodation is non-declared because there is a lot of illegal accommodation, the owners of which do not abide by the health and safety and security rules

stipulated by the regional government. It is a phenomenon that can harm the image of rural tourism. More measures and controls are clearly necessary to avoid this type of accommodation.

(b) Rural tourism is still considered to be very affordable; people who practice tourism are individuals with an average monthly income between 1000 and 1300 euros (€). This increases dramatically if we analyse individuals who take part in rural tourism activities motivated by snow sports, mainly skiing. Their average income is between €1800 and 2300 monthly.

(c) 23.4% of people who took part in rural tourism and were considered in the survey, chose an area close to their homes, because 94.7% of the people use their own vehicle to travel, whereas the 5.3% left uses public transport, although in rural areas, the road network can be poor, and lacking somewhat in the main communication links. We also found from the survey that 54.3% opt for a rural destination in another province of Andalusia and that 22.3% prefer other regions. Fig. 8.3 shows the increase of the rural tourism in Andalusia.

Knowing a tourist's motivation, the requirements which push him/her to act and behave in a specific way means it would be possible to offer the ideal tourist product. Only 28.7% of respondents to the survey practised rural tourism in the period mentioned above. Of them, 38.2% declared that the motivation that drove them to choose this type of tourism was being in contact with nature; 6.4% were motivated to play some sports, hunting, fishing, skiing; 35.4% were motivated by the tranquillity that comes from this type of destination; 4.3% were motivated by visiting relatives or friends or having a second home in the rural area, and 7.9% were motivated by the cultural attractions (Fig. 8.4).

What are the economic and demographic features of the tourists in the survey? We can differentiate a first section made up of individuals of 20 to 30 years old. They travel on their own or with another person. They represent 48.6% of the survey. The second group is made up of individuals of 31 to 50 years old who travelled with a minimum of three members of their family. They represent 39.5%. Groups of people younger than 20 and/or older than 50 are not significant because people younger than 20 were with their family in 94% of cases, and, of the people older than 50, 86.5% were rural tourists but were visiting relatives. This type of tourism is not considered to be one which generates wealth in the area.

Important differences between the features of the two main groups can be distinguished:

Group 1: monthly income of the individuals in this group is about €700. The average expense is about €35, including accommodation, and the length of stay is about 4 days. They know the destination mainly through the Internet and the motivations which lead them to the place are playing sports such as mountain climbing, hiking, etc.

Group 2: On the contrary, the monthly income of the individuals that constitute this group is about €1800; the average expense is about €43.4, including accommodation, and their length of stay is about 7 days. As we can see, the economic figures are much higher. They tend to know the destination through booklets and friends. The motivations that drive them to this destination are tranquillity that prevails in the local regions and the contact with nature.
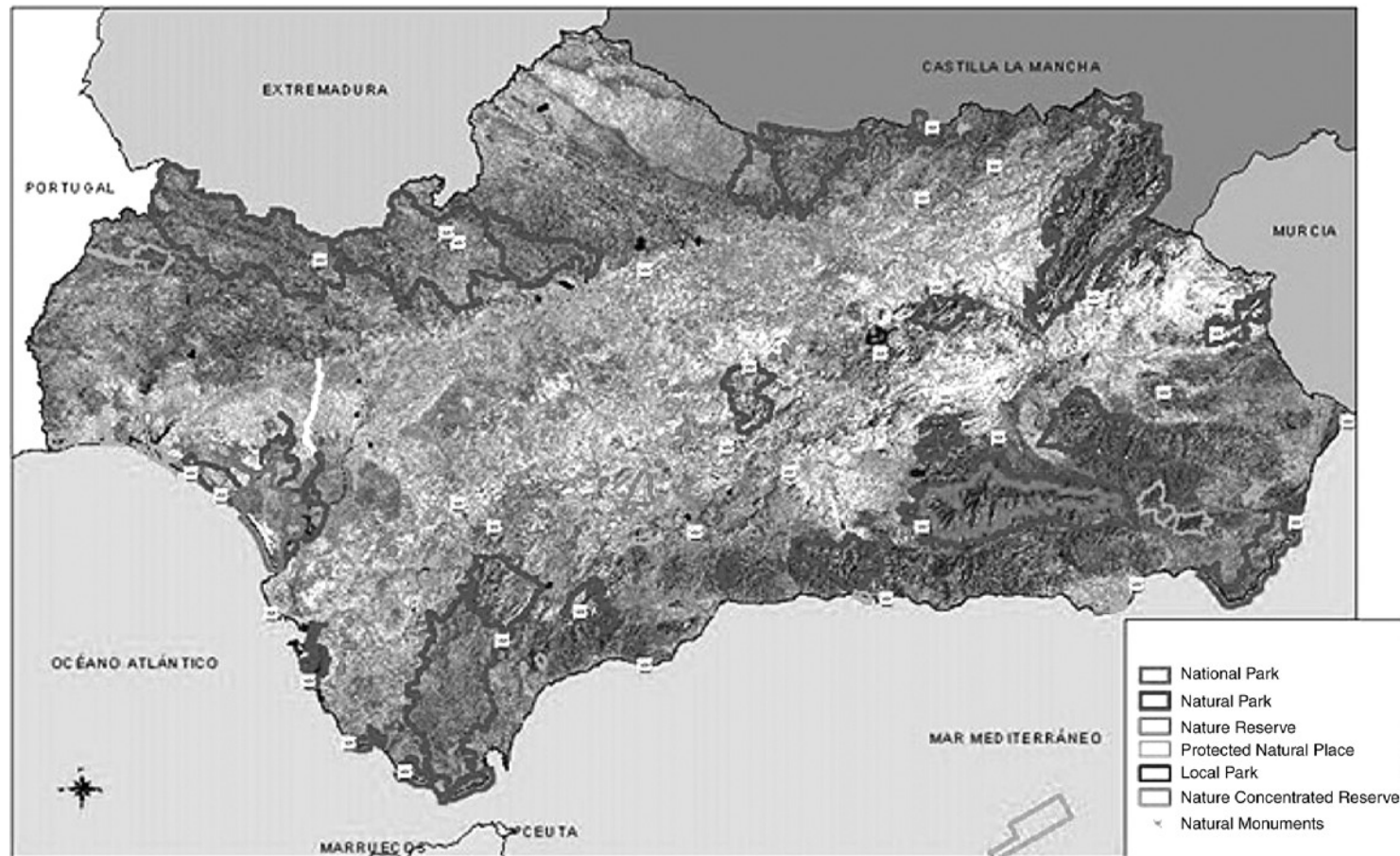
Fig. 8.2. Natural places protected in Andalusia.
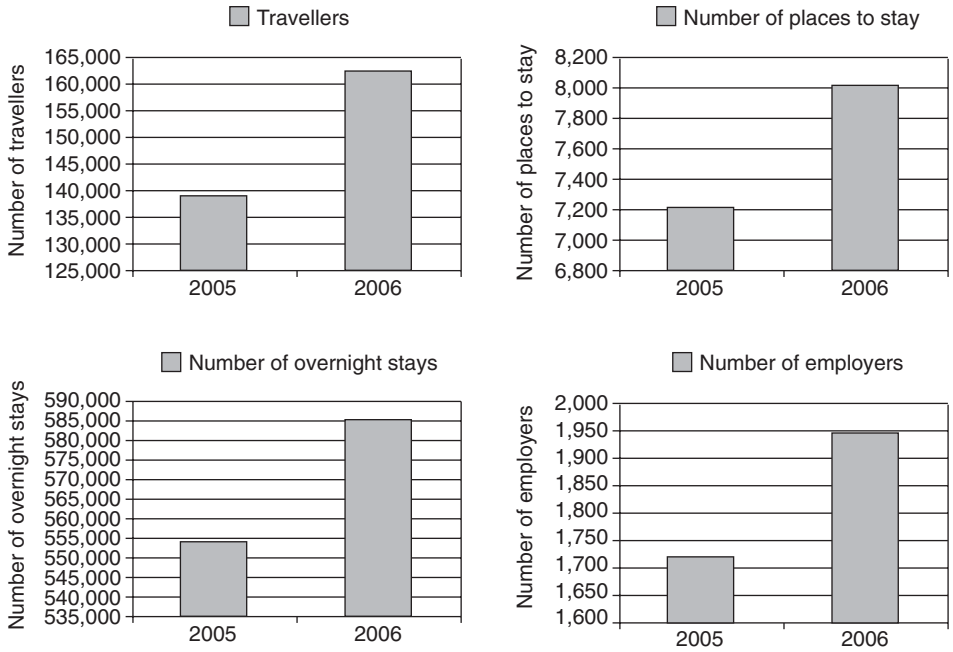
Fig. 8.3. Experimental evolution in the number of travellers, overnight stays, accommodation places and employers in the segment of rural tourism in Andalusia 2005–2006.
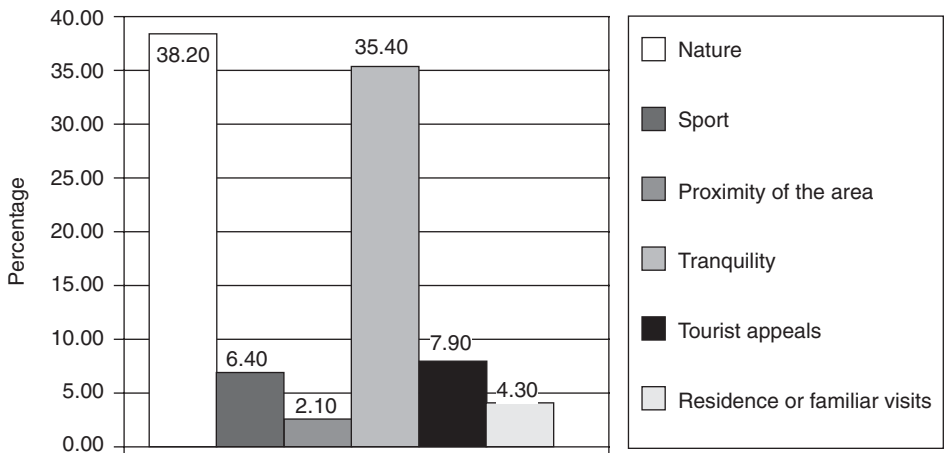
Fig. 8.4. Motivations to make rural tourism.

Rural Tourism in the Natural Parks of the Province of Cordoba

This section is based on research in the province of Cordoba from March to June 2004. Five hundred and fifty-two people were surveyed who had experienced rural tourism in any of the three natural parks in Cordoba. We used a Logit model to show the probability of satisfaction in relation to the tourist's expectations according to the socio-economic profile. Initially, by means of a descriptive analysis of the survey, we got the following results: 82.1% of the polled tourists were from Andalusia, 9.2% were from Madrid, 4.1% from Castilla-La Mancha, 3.3% came from Catalonia and 1.9% from other regions; only 0.2% were foreigners (Fig. 8.5). In relation to their knowledge of the natural park they had visited: 46.3% of the tourists had visited before; 37.8% of the tourists had visited the park on the recommendation of friends or relatives; 12.1% found information on the Internet, and 3.8% used other media (Fig. 8.6).

The variable subject of study was the satisfaction that the polled person obtained after having gone on a rural tourism holiday in a park: gs, tabulated as dichotomous variable (1 = satisfied), (0 = non-satisfied).
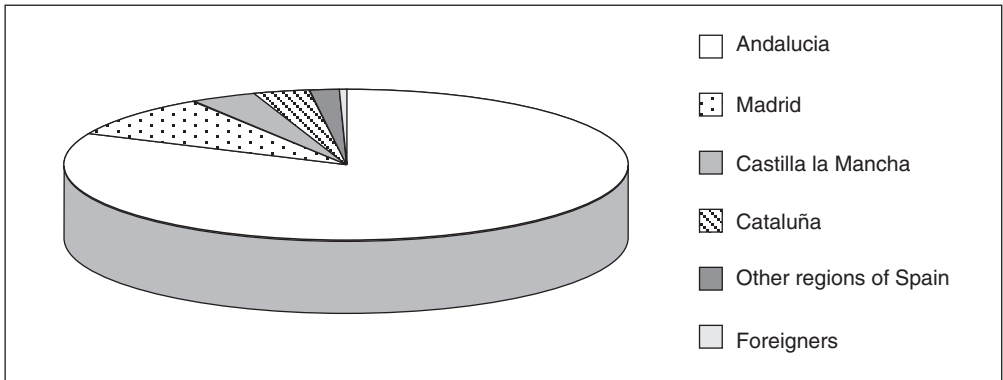
Fig. 8.5. Origin of tourists who visit the Natural Parks of Cordoba.
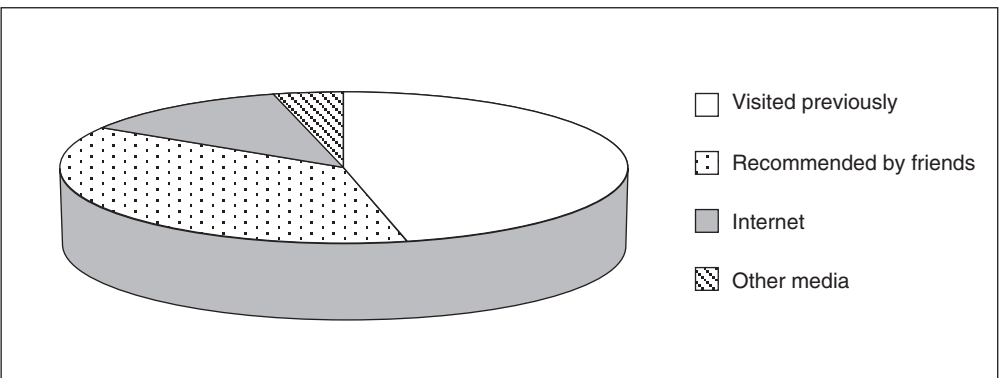
Fig. 8.6. Methods by which tourists know the Natural Parks of Cordoba.

Table 8.1. Binary logit model: the demand of rural tourism in a natural park in southern Spain.

$$gs = 1/(1+e^{-(\beta_0 + \beta_1 ecc + \beta_2 ecd + \beta_3 ecs + \beta_4 eco + \beta_5 edad + b_6 zona + \beta_7 rf + \beta_8 nif + \beta_9 niv + \beta_{10} gr + \beta_{11} sexo + \beta_{12} dv + \beta_{13} alo + \beta_{14} bal + \beta_{15} ap + \beta_{16} nem + \beta_{17} nes + \beta_{18} nse + \beta_{19} neb + \beta_{20} re + \beta_{21} hr\text{-}cr + \beta_{22} gr + \beta_{23} inf + \beta_{24} oep)}) + \varepsilon$$

Dependent variable: gs
Method: ML - Binary Logit (Quadratic hill climbing)
Included observations: 500
Convergence achieved after 11 iterations

Variable	Estimated coefficient
Ordenada	B_0 = 15.796394
Marital status married (ecc)	B_1 = 11.256522
Marital status divorced (ecd)	B_2 = 10.098884
Marital status single (ecs)	B_3 = 12.648678
Other marital status (eco)	B_4 = 7.356542
Age (edad)	B_5 = 0.009369
Area (zona)	B_6 = −0.368768
Family income (rf)	B_7 = −0.589762
Numbers of people who are in the family (nif)	B_8 = 0.068345
Numbers of people who were on holiday (niv)	B_9 = 0.025689
Expenses spent for holiday (gr)	B_{10} = −0.028963
Sex (sexo)	B_{11} = 0.418692
Holiday days (dv)	B_{12} = 0.127658
Other types of accommodation (alo)	B_{13} = 0.015261
Spa (bal)	B_{14} = 0.565681
Hotel (ap)	B_{15} = 0.028365
Average studies (nem)	B_{16} = 12.675665
High studies (nes)	B_{17} = 11.548693
Without any studies (nse)	B_{18} = 0.032547
Basic studies (neb)	B_{19} = 12.38976
Individual world repeat experience (re)	B_{20} = 0.536867
Rural hotels and rural house (hr-cr)	B_{21} = 1.463325
Expenses spent (gr)	B_{22} = 0.068935
Opinion in relation to the hotel infrastructure (inf)	B_{23} = -0.568426
Opinion about the expectation of the park (oep)	B_{24} = 0.033587

Analysing the estimated model (Table 8.1), it is deduced:

1. Single tourists are more satisfied in relation to their expectations about the park. It is observed by means of the coefficient, B_3, which is positive; this is characteristic of male rural tourists who are single, with a few days holiday, and with only a small family income available.

2. Age, the area individuals come from and family income are negative variables in relation to the park.

3. Polled tourists consider hotel infrastructures inadequate (-0.568426) decreasing the probability of satisfaction with the park from the secondary image they had before going to the park, to the primary image after having visited it.

4. Polled rural tourists consider destination satisfactory, repeating the experience according to the coefficient $B_{20} = 0.536867$.

Considering the model estimated previously, we can conclude that hotel infrastructure supply (rural houses and rural hotels) is insufficient in some seasons during the year, and this means that demand is not satisfied and tourists look for other natural parks.

Rural tourism demand is increasing and there is a high probability that a tourist repeats an experience, so the model guarantees a minimum demand that will cover the cost of new investments in the rural area.

It is necessary to coordinate and plan any activity and tourist initiative that can generate an economic flowering. In Andalusia, we are still on target to be the first region to supply the demand for rural tourism, because time is changing quickly; the markets for rural tourist destinations are growing at increasing speed. So companies, not only hotels but all the complementary services (area stores, craftsmen…), should anticipate this possible demand with swiftness and precision. A good estimate of demand is necessary to ensure investment is at a level appropriate to the future.

Throughout this field study, we have dealt with the identification of the main parameters that the tourist has. This tourist visits a specific rural destination and a specific natural park in Cordoba. It suggests not only to the public agents but also the private initiative the behaviour's guidelines to be able to determine short-term trends.

Conclusions

In this paper we have analysed a series of econometric studies, some of them focused on demand. These econometric studies can determine the rural tourist's profile, the grade of satisfaction of the rural area visited by the tourist and the demand of rural tourism. Other econometric studies try to find out if rural tourism has enriched female employment and, finally, a study of the existing offer in rural tourism (winery in the wine route and tourist accommodation, etc.) with the aim of knowing what kinds of rural tourism are offered to the rural tourist, and if those kinds of rural tourism are involved with local organizations and the development of the environment.

The general conclusions obtained by these studies can be divided into three groups: (a) the conclusions noticed by customers (demand); (b) those noticed by the offer (rural tourism accommodation, stores, etc.); (c) conclusions common to both groups.

Conclusions noticed by customers

First, the lack of supplementary activities in the areas where rural tourism is developed, for example in the natural parks there are not a lot of ecotourism activities; and in the wine routes there are not playful activities, gastronomic fairs, etc.; in this last modality the tourist complains about the very reduced public open timetables in the wineries and the closing of many wineries during bank holidays and at the weekends.

Second, the lack of professional qualification of people who help customers in relation to the services rendered, not only in tourist accommodation, but also in annexed activities.

Third, there is a high grade of satisfaction on the part of the customer when he or she visits natural parks. This satisfaction is aimed more at the environment than with the rendered service, this service being one of the main complaints.

Offer conclusions

1. Short of investment for the modernization of facilities. Moreover, these facilities should be adapted to new technologies and energy savings.

2. No major problems were noted on the natural environment where the tourist activity is developed.

3. The offer should understand the tourists' needs and it should check if tourists are satisfied to be offered a differentiated product in the market, and to work with people who have a proper formation and qualification in relation to the services rendered and to improve the quality of this service.

4. Quality and environment process systems should be improved in the rural tourist places, which will bring forth a new generation of competitive and profitable products.

General conclusions

1. There is a growing demand for rural tourism in the province of Cordoba, as can be observed through the estimated models, which favours investment in tourist accommodation, and added activities as restoration.

2. An increase in employment is foreseen as a consequence of the increase in demand for rural tourism. However, women will generally work in jobs needing low qualifications because polled women with degrees prefer to work in urban areas.

3. Rural tourism in the province of Cordoba generates alternative incomes to the local population, but it is essential not to consider tourism as the main activity because the state of conservation of the natural environment would be in danger, and we cannot forget that one of the main motivations for the tourist to experience this type of tourism, is to be in contact with nature.

4. Lack of hotel infrastructure in the natural parks. The demand cannot be helped in busy seasons of the year, especially bank holidays, Christmas and Easter.

5. Bad communications with public transport. More than 75% of rural tourists drive their own cars in order to carry out this type of tourism due to the lack of public transport in these areas (Hornachuelos Park or Villa de Priego).

6. Over-exploitation of the natural resources (especially the hunting ones in Hornachuelos Park; this entails a degree of environmental degradation).

7. There is a lack of proper advertising where the qualities and advantages of rural tourism in Cordoba are shown. A higher investment in the promotion of tourist destinations is necessary. It was observed in the survey that return visits

and friends' recommendations make up 50% of the responses of how tourists have heard about the rural areas.

8. Although there is a rise in the number of tourists, the number of overnight stays in rural accommodation should increase, because 69.3% of tourists stay between 1 and 3 days.

9. The increase of prices in the rural areas is not related to the increase in the incomes of local people. This is because there are few locals who get the benefits of rural tourism, especially in Hornachuelos Park, due to the fact that people who exploit the rural tourist activities are not from the area.

10. There is a lack of awareness of the citizenship in relation to the existence of the tourist potential in the region which is still not exploited.

11. Tighter control of the offer of illegal accommodation, which gives bad service and a bad image to the rural tourist; supervising legal accommodation, making more use of the adjective 'rural', so differentiating between the legal and illegal forms of accommodation, by means of the former's originality, authenticity, and global quality (the totality of rendered services).

12. Authorities should monitor the consequences of rural tourism to the local economy and environment in order to avoid its degradation.

Finally, as a future research line, there is a need for a study examining the relationship that can exist between wine tourism in the Montilla-Moriles area, cultural tourism (focused on the city of Cordoba) and rural tourism (focused on the Subbetica Natural Park). In this way, and with this tourist route, we could get waves of tourists that combine two (or even three) tourist destinations, implying, in this sense, a higher redistribution of income.

Appendix

The main pre-determined variables used in this survey have been:

– Sex of the polled person
– Age (more than 18 years old)
– Area, place of residence that was tabulated as a dichotomous variable (1 = urban area), (0 = rural area).
– Marital status. Divided between varied artificial variables of binary choice, highlighting the main categories **ecs** (marital status single), **ecc** (marital status married), **ecd** (marital status divorced/separated), and **eco** (other marital status).
– Family income: **rf**, measures in thousands of euros per month.
– Numbers of people who are in the family: **nif**
– Numbers of people who were on holidays belonging to the family or with a certain degree of emotional relationship with the polled individual: **niv**.
– Type of accommodation used for holidays: **hr-cr** (rural hotels), **ap** (flats), **bal** (spa or thermal spa), **alo** (other types of accommodation).
– Expenses spent for holidays: **gr**.
– Individual would repeat the same kind of tourism: **re**, tabulated as dichotomous variable (1 = yes) (0 = no).

- Holiday days spent in the type of tourism: **dv**.
- Academic level of the individual: **nes** (high studies), **nem** (average studies), **neb** (basic studies), **nse** (without any studies).
- Opinion about the hotel infrastructures in the park: **inf**, that is, if there was enough rural accommodation (hotels and houses) tabulated (1 = yes) and (0 = no).
- Opinion about the expectation of the park (caring for park, signposting, advertising, road infrastructures,…) **oep**, tabulated (1 = positive), (0 = negative).

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9 Setting the Scene: Politics of Transformation and Narratives of Preservation in Botiza (Romania)

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Introduction

The theme of this chapter deals mainly with those spaces in which the tourism experience occurs. I shall speak of places, landscape and transformation by considering space as a social product, and consequently the relationship between tourists, local community and territory, 'in a dynamic and historically contextualized way' (Lai, 2000: 14). In particular, I will discuss the relatedness between the inhabitants and the town as seen by the foreigners, in this case, the tourists.

To do this, in the first part of this chapter I will present the place of my research in order to then describe the economic and social changes observed that have taken place over a period of 2 years.[1] Finally, I turn to discuss some of the academic literature that underlines the researchers' attention on the 'impacts of tourism' (Stronza, 2001).

I will use my research experience in Botiza to show how, in this tourism locality, two experiential spheres coexist; both are quite evident and endowed with specific practices and vocabulary. On the one hand, tourists and locals use narratives that set Botiza in an ideal situation which preserves a past that does not have a precise temporal reference, a situation created both by the tourists and the locals, through a sort of mirror game which reflects what one expects from the other. On the other hand, the local organization, the economic policies and the increasing tourism demand drive various actors (institutional, tourist intermediaries, etc.) to carry out profound and dynamic changes in that locality.

The ethnography I will refer to illustrates this dichotomy. For instance, the rooms of the guesthouses were made comfortable and inviting, according to the expectations of the tourists who particularly appreciated a 'rustic' style that strengthens their belief that they have chosen a 'rural' holiday destination. This is the reason the practices of manipulation of the internal and external spaces take into account the taste of the tourists and the modernization that is

necessarily carried out for restoration and decor is done so as to maintain the characteristics that are considered traditional.

In short, this chapter aims at demonstrating through ethnographic evidence what Picard (1995) defines as 'tourist setting', as opposed to 'tourist territory'.

> In the process of touristification, it is not only the landscape and the local colour but also the cultural traditions of a society, and the distinctive markers by which its members acknowledge their being a part of it, which are being severed from the context, serialized and combined with a view to composing a tourist product (Picard, 1995: 46).

From a given 'territory' people build up a certain 'setting' that is suitable for the new context and the tourist demand. Significant data of this process are drawn from architecture and landscape features, as in this ethnography, but they may as well be observed in clothing style and house decoration and furniture, all elements that directly brand individual status (Barberani, 2006).

Botiza and its First Steps in Tourism Organization

Botiza, a town of approximately 3000 inhabitants, is one of the municipalities of Maramureș,[2] which is mostly a mountainous region, situated in the north-west of Romania, and which occupies a vast area of the Western Carpathians. Since the 1970s Maramureș has been singled out by the Romanian Ministry of Tourism as a region of extreme interest from a tourism point of view because of the beauty of its landscape and the presence of local traditions that have been the object of various research studies on folklore and popular traditions.[3]

Botiza is surrounded by hills covered by forests, at the foot of the mountain of Tibleș, of volcanic origin, characterized by its conical relief and rare plants.[4] The town is crossed by the river Botiza which is formed by the confluence of two smaller rivers,[5] the Sașu and the Baita.

It is a quite charming landscape that the tourism brochures have been able to exploit and which they represent in the images in quite an effective way. For example, in a German Internet web site full of detailed information on Maramureș, in the part dedicated to Botiza, the description begins like a fairy-tale: 'Once upon a time there was and there still is a small village called Botiza'.[6] In a tone that aims to be humorous, the principal characteristics of the town are presented: agricultural economy, mining deposits, traditional weaving, united community. The final invitation to go to Botiza, written in German, assures the tourist that he/she 'here will not be a tourist'.[7]

Because of national legislation before 1989, which imposed strict laws of entry and hospitality to foreigners for 20 years in Romania, the development of mass tourism only started in the 1990s with the acceptance of foreign invest-ments. In 1989 the PHARE Programme (a programme for the community assistance to East and Central European countries) initiated investments in order to foster local development. Initially the projects were not directly aimed at the development of tourism but, in time, initiatives have been dedicated to the promotion and the development of local tourism. From 1994 ANTREC and

OVR[8] (Operation Villages Roumaines – agro tour art) began a network of tourism offers by choosing three towns in Maramureș (Ieud, Vadu Izei and Botiza).

In Botiza between 1994 and 2001 about 20 families decided to join the two associations (ANTREC and OVR) and managed to offer a particular kind of tourism hospitality. The type of tourism proposed was on a small scale – there are no large infrastructures and the tourism flow is concentrated in three main periods of the year (summer, Christmas, Easter).

Nature in Botiza and 'The Natural Inhabitants'

The two main elements that constitute the tourism potential in Botiza are the following: on one hand the historical moment which is particularly fortunate, in which the interest for rural tourism has coincided with the opening up of Romanian villages in order to seek new forms of income; and on the other hand, the use of anthropological and other literature underlining its archaic features and the persistence of traditions that have disappeared elsewhere, in order to distinguish Maramureș from the rest of the country. Both of these elements have favoured the entry of Botiza to the tourism market. Nature and local products become the tourism potential that gives a distinctive feature to the locality itself.

In this context, some key people and their entrepreneurial skills are of vital importance for tourism development, for example Petru Iacob (the coordinator of OVR in Botiza) used these two elements in his attempt to insert Botiza in a far-reaching tourism circuit. He went as far as Brussels to make ties with the OVR of which he then became a local partner.[9] The Mayor[10] of Botiza also talks of the tourism potential and underlines some of the characteristics of the landscape as well as a series of elements linked to notions of 'natural' and 'traditional'.

> We have many tourism opportunities, this is a fascinating mountain region, we may offer natural goods, natural food, home-grown vegetables, fresh eggs, meat and milk, home-made cheese, and there are also well-preserved customs and traditions and these attract the tourists (Ioana, Romanian).[11]

In Botiza, what was once 'celebrated' for the local community, what was once 'played' for the other neighbours of the community, what was once 'intimate', now, with the increasing flow of tourists, has become the content to be shown, to be produced, to be circulated in a programmed way, with a new target – the tourist. In the middle there is a changing economy that finds itself in dangerous twists and turns, in situations that are new and uncertain. Local people have to re-examine themselves, 'we are trying to explore what we have here', says the Mayor, and with the term 'explore' she means the need to see themselves with new eyes, which also take into account the watchful eyes of the tourists.

The 'potential' of the community and of the place, the hidden treasures, are first explored and then discovered, after the contact with the external world, where certain products that the community owns in a greater and more evident measure (music, architecture, rituals, etc.) are used as riches. Thus, it is a 'conversion' of the observing eye that takes place in this community. It is a conversion of abilities, of

visions of the world, of capital, which implies a 're-conversion' of knowledge, practices and narratives. In explaining the 'balinization' of Bali, Picard claims that:

> As soon as a society offers itself for sale on market, as soon as it attempts to enhance its appeal to the eyes of foreign visitors, it is the very consciousness that society has of itself which is being affected (Picard, 1995: 46).

Quite often local communities see in tourists the embodiment of western lifestyle: wealthy and beyond reach. In this case, tourists reflect a desire of 'naturalness' and 'oldness' that in Botiza can be satisfied. Host communities learn to adapt and to respond to tourists' needs, beginning with the management of local resources. Initially, the reasons that drive local communities towards the organization of forms of rural tourism are of an essentially economic nature, but often in the course of the activity, a kind of pride is built up, a pride for one's own knowledge, one's products that are so much appreciated by outsiders, that it ends up increasing the initial basis.

From the tourists' point of view, the economic prosperity, the cult of the holiday, and the deterioration of city life favour rural tourism and the search for a diversification of the destinations and spaces where one can 'breath'.[12] The grounds for rural tourism go from environmental interests to the existential dimension, from the gastronomic quest to the search for a 'different' culture.

> Much of modern nature tourism takes the form of a nostalgic experience. Humankind's appreciation for the natural is often related to our sense of the distance between ourselves and the nature. The further we distance ourselves from nature, the more nostalgic are we likely to become. Nostalgic nature tourism is different from the embedded experience, in that nature is experienced from a "safe" distance, as a unique travel adventure from which the tourist fully expects to return (Chambers, 2000: 74).

Botiza – 'Living in a Fairy Tale'

Tourists claiming to appreciate Botiza for its landscape, that contains both natural and cultural elements, perceive it as the result of a 'pure' lifestyle, untouched by the aggressions of modern time. Quite often, from the narratives of tourists emerges the notion of a landscape that connotes the population itself, and that at times is even confused with the tourist's imagination tied to the preconceived idea of the sense of local hospitality.

From the numerous discussions that I had with tourists I have noticed that the association of people to the landscape in which they live is frequent. It is quite natural for tourists to think about how they are hosted and the landscape of the place they go to. This explains why reception and hospitality are seen, above all, as a part of the landscape, so intrinsically connected to the lived experience as to not be able to separate the relationship of the people from the landscape of which they are a part. For example Marco, an Italian tourist, speaks very highly of Botiza, of the beauty of the landscape and the nature that fascinates him and, in his considerations, the merging together of nature and people is quite evident. Landscape and people are held to be naturalizing elements that characterize the place, whose value makes them tourist attractions:

> I think that a tourist can hardly be left untouched by all this beauty [Botiza's landscape], I had proof of this when we managed to bring to Botiza about fifty people for our marriage. For most of them it was the first visit to Romania: they were enthusiastic not only for the landscape, but also for the people they met in town, simple and warm-hearted people, with moral values that no longer exist in other towns. I believe that in most cases tourists are fascinated by the landscape and the people they meet in Maramureș. By the landscape I also mean the orthodox churches and the wooden architectural tradition (Marco, Italian).

I believe it is important to underline, in this account, also the merging together of 'uncontaminated' values: nature and people are considered inside a continuum that makes them impermeable to a possible decline, not only of the landscape but also of a moral nature. Tourists look for certain holiday destinations in the search for a nostalgic experience, of 'a life one never lived' (Bruner, 2005: 144) and Botiza seems to be quite the thing. The account of Anton, a young French tourist, who chooses his holiday destinations on the basis of his interest in nature, clearly demonstrates the association of the local community with the landscape.

> The time I spent here is incredible. I could never even imagine feeling so well here. Usually I spend my holidays in the Pyrenees because I like the mountains and exploring different places, so when I choose my holiday destination I always look for these two things. However, here I am fascinated by nature and the contact with people, I could have never thought, it is not that common. What I am experiencing here is not rational, everything is so spontaneous that I fear that sooner or later it will be lost. The relation with nature and the relation with people make me feel very well. People are so nice, they welcome you so warmly both in their houses and in their world. More, they themselves have a strong relationship with nature: beside tourists, they look for a strong contact with nature (Anton, French).

According to this tourist, 'the relationship with nature' and the 'relationship with people' are both connotative elements of the holiday. For Trudi as well, a French tourist, the tourism experience in Botiza assumes a special importance, thanks to the relationship that she was able to develop with the people of the place:

> The way people receive others with enthusiasm and the landscape are the reasons why I came back here once again and for these reasons I would do it again and again. (…) Olga and Vasile [her hosts] are so nice that they make you feel really well (Trudi, French).

By listening to the tourists' conversations on return from their excursions, I have often heard exclamations of the type 'I feel I have ended up in a fairy tale town'. In the collective imagination of the European tourists I met, Botiza seems to have many of the characteristics of childhood fairy tale landscapes and the tourism experience is enriched with a mythicized habitat.

Behind the Fairy Tale

Being lodged in private houses may distract many tourists from the idea that host families also have economic motivations. It is important to underline how, in

many tourist experiences, the business nature of tourism remains veiled, hidden, certainly in the background with respect to the personalization of the relationship. According to Bruner (1996: 299–300), one of the consequences of requesting money on the part of the locals is the 'unmasking' of the business side of tourism. The tourists want to believe in the myth of the encounter; they want to believe that they have become friends of the locals (Aime, 2005).

In Botiza, the tourists perceive being hosted in houses assigned for this purpose as a free exchange within a relationship of friendship. The fact that they pay for the board and lodgings, in other words for the hospitality received, is put aside in their minds as a matter of secondary importance. What, on the contrary, emerges from the narratives is the relationship with the host family, the warmth, the friendship, the bonds that are established during the stay and the links that may endure once back at home.

In the narratives of the tourists, the hospitality received is sometimes so idealized as to be held as one of the main local characteristics. Often the tourists refer to a kind of contamination, that for them would mean desecration from outside, as if others similar to them, but not they themselves, could be the causes of deplorable changes in a locality that other agents of change would have, on the contrary, not contaminated. A tourist told me that he feared the opening up of Botiza to a 'West that necessarily destroys values', thus considering that those local values were at risk of being contaminated just as much as the natural resources.

Generally speaking, the tourists do not take into account that the landscape which they admire and which assumes a totalizing value of the entire tourist experience is subject to changes and manipulations especially through those who, in that landscape, live and work not only today but also in the past. They also do not take into account that its beauty, which makes it look as if it has 'come out of a fairy tale'[13] is also the result of the work of the men and the women who work and have worked there in order to make the best profits possible from their farming land.

Nowadays, Botiza's landscape is also manipulated for tourist reasons – local people decorate their house facades, build new wooden gates, decorate gardens, etc. As a guest of the Petric family, I myself participated in some of the works of restoration of their house, for example I painted the door of the new dining room. In the summer of the year 2000, the Petric family decided to change the use of some of the rooms and, for this reason, the room that was used as a dining room and was located on the first floor of the house became a new bedroom. A bigger room on the ground floor, that until then had been used as a shed, was restored so that it could be used as a dining room. This room was separated from the other part of the house, because it only had an external entry from the courtyard and therefore did not have an entry into the kitchen or into the other rooms. Once this inconvenience of having only an external entry was overcome, the room became quite pleasant: the internal walls were plastered in a light-blue colour, the old front door restored and embellished with glass and painted in the same brown colour as the other casings. As a tourist, I ate many times in that dining room, and as part of the household I helped in the restoration work by painting the front door.

At the local level there is an intense activity in order to modernize the town and make it as welcoming and as enjoyable as possible. Some houses are more attractive than others because the courtyards are decorated with flowers, small wooden sculptures, wooden benches and tables, etc., and the balconies are full of pots with flowers and creeping plants. The Buftea family house, in particular, is much appreciated by tourists because of the care that is taken of the external courtyard and which is seen as an example for the other host families. On the other hand, the farmers' houses that have not been 'tourist transformed' seem less charming to the tourist's gaze (Urry, 1995), though they might seem 'picturesque' because the old trunks, of which they are made, are blackened by age and the farmers are not interested in adorning them with plants and ornaments.

What tourists appreciate as 'typical and rural' is, then, a local interpretation of Western urban designs, which are enacted by Botiza's residents knowing for certain that they will be appreciated by tourists. 'Since tourism is a potential form of income, the locals end up following the laws of demand and consequently, propose their offer' (Aime, 2005: 131). It is interesting to observe how, in the past few years, we assisted in a process of inversion from local aesthetic criteria (particularly on houses and decoration) as a direct consequence of the prolonged contact with the tourist gaze, which brings new values and interests. Tourist attention has transformed local architecture and landscape features, symbols of backwardness and rural life, into valuable objects considered as synonyms of tradition and authenticity.

Some landscape features are 'valorized' by practices that come about via a complex synergy which compare the local and the external and that modify a given environment into a 'scenography' of a tourism landscape. As we shall see, an example of the 'valorization' of Botiza is represented by public lighting, a necessary public operation for those who do not know the streets of the town well enough to be able to get about in the dark.

'I Have Tried to Make the Roads Practicable'

The ethnography that I carried out in Botiza, by returning several times in the field, allowed me to observe the changes as they occurred. Some were quite evident, others less so, a lot of them should be related to the fact that Botiza has not remained immobile but has changed and organized itself in order to better deal with the reception of tourists. According to Abram and Waldren (1997), the effects and changes introduced by tourism are to be linked back to the local traditions and the ways of dealing with the relationship with the 'other'.

> Rather than arguing that tourism destroys authentic local culture, we show how it can provide the setting for people to reconsider how they identify themselves, and how they relate to the rest of the world (Abram and Waldren, 1997: 10).

We can clearly see from the words of the Mayor of Botiza that the problem of the local management of tourism is a question that closely concerns the local politicians and administrators and which encourages the Mayor to work in order to promote tourism by operating, in the first place, on the urban landscape.

> For our country, tourism is an exceptional solution to the economic problems that in recent years have more or less concerned the whole of Romania. This is why, as the Mayor of Botiza, I have decided to concentrate many activities in the area of tourism. I have tried to fix up the infrastructures, to bring running water to houses, so that they could all have their own bathrooms with sufficient water. I have tried to make the roads practicable in order that automobiles can drive from place to place in Botiza. I have worked on the public illumination of Botiza, and on the direct telephone services, because otherwise, here we would be isolated (Ioana, Romanian).

The most obvious example of the commitment of the municipal administration to make the town as accessible as possible to the tourists is given by the road. In 1999 only a few cars drove around the town and the asphalt road only went to the centre of the town, where there is the market and where the buses arrive. All the other roads were dirt and gravel roads that could be used by carts and buggies, suitable as tracks along the fields, but not for the cars of the tourists. During my fieldwork, I often saw tourists examining their cars for the damage done by the stones of the paving or perplexed as to whether to continue, though slowly, among those ditches and so risking ruining the tyres and the car. In the summer of 2000, a brand new road welcomed the tourists and brought them to the far ends of the town, within reach of those houses which exhibit signs for tourists but that are not located in the centre of the town.

Thanks to the funds received by the PHARE projects for local development and by the World Bank,[14] the municipality intended to improve all services, and after the municipal elections (June 2000) the large public works were initiated. One of them was the illumination plant, which in 2000 covered a radius of 1 km from the main public square (considering that at night Botiza, like almost all Romanian towns, was completely in the dark). Another important public work was the waterworks plant, which brings running water to the proximity of the houses, supplying them with hand water pumps.[15]

Indeed, lampposts and asphalt roads deeply affect landscape, while allowing people to take advantage of some modern comforts and, of course, they make the town more accessible to tourists. When there was no public lighting, the groups of tourists that ventured outside after dinner had to carry torches, and this often created problems for some to go out at night for a walk. At times, the tourists did not have torches and so they would ask their hosts for some, and they often may have found it difficult to understand what was required of them, or they simply did not have torches available, or even more often they did not have the batteries. Furthermore, most of the locals did not consider this necessity a problem, because the locals know 'every stone and every pothole' of their roads and they do not need any lighting to walk along the roads.

What is evident here is one of the ambiguities present in the tourism phenomenon. On the one hand, making the place more 'accessible and practicable' to tourists facilitates the access of those who, though seeking a rural environment, are unable to give up some of the comforts of modern living, especially those comforts that urban living has made indispensable. On the other hand, the countryside that many tourists seek, and are attracted by, needs to be devoid of elements of modernization. Urry (1995) observes how rural tourism is a typical phenomenon of postmodern societies that are attracted by the countryside because it is seen as a place of freedom and as a link to the past.

It is clear that we are not dealing with the European mechanized and aseptic countryside, but rather with the countryside where, for example, regions like that of Maramureș still allow a certain experimentation. The stereotypical idea of a countryside full of bundles of hay and perhaps a cart led by horses that climbs up the hidden tracks to carry silent peasants with their pitch forks, in Maramureș is a reality and it is the landscape that the tourist industry proposes to its tourists.

According to Davidson (1992) the possibility of survival of the rural population depends on its adhesion to tourism. Tourism can be a surplus source of income which allows the locals to add to their economic income and to continue to live and work in the countryside, thus making this choice of lifestyle appealing also to younger generations (Davidson, 1992: 140–143).

From the economic perspective, it is in fact easy to imagine how, in a small scale context like that of Botiza, tourism generates wealth in a very brief period of time.[16] For example, thanks to tourism Olga Petric (my host) affirms that she is able, in a relatively brief period of time, to put millions of Lei[17] in the bank, which correspond to the earnings of years of work as a primary school teacher, that she would have had great difficulty putting aside without tourism activity.

Moreover, it is not only the host families who improve their economic status but also several local people whose work and services support the tourist offer – from those who dye wool, to those who weave carpets; from shepherds who produce wool, milk and cheese, to those who raise animals to produce meat; from those who help with housework or with fieldwork, to bar and shop owners. To some extent they all help the tourist industry to cope with the new need for services and goods. Indeed, besides providing work for those who are directly involved with tourism hospitality, tourism is also a form of income for those who work on the edge of the tourism market but who are just as useful because they supply products and labour.

The tourism income helps to improve the living conditions of the host families, as well as achieving the minimum hygiene requirements necessary in order to host tourists. Over time, the habits imported from outside become models of behaviour to imitate. Therefore, if at the beginning of the tourism activity the internal toilet was necessary to host tourists, while maintaining the external one,[18] later on that construction, at the edge of the vegetable garden and hidden from the eyes of the tourist, will be substituted by a purely decorative flower patch. Eventually, many families will also install a second internal toilet.

Tourist intermediaries, administrators and those responsible for the local associations say that they are satisfied with the changes introduced by tourism within the community. For example, Grigore Barlea (director of the OVR of Vadu Izei) has identified a whole list of factors that, in his opinion, indicate how tourism has improved the 'quality of life of the locals', by also influencing their way of thinking. He includes the use of an indoor toilet, the progressive improvement of the quality of the services offered – stimulated by the competition within the town – the development of the agricultural sector, as well as the handicraft sector which adapts to the tourism demand. Furthermore, tourism is considered a complementary form of income for those who intend to supplement their salary without playing major roles in the tourism sector.

> For example, those who work in the town, and perhaps have a salary as an official employee, or in the education sector, may also produce handcrafted wooden objects. Many people may not work at home but at home they may have a cow, or some chickens, or pigs, or even horses and they use them to carry goods. They may even have a small plot of agricultural land. For example, those who are unemployed and can only obtain the minimum to support the family thanks to tourism now have the possibility of developing their own activities and do something to improve their own home (Grigore, Romanian).

Moreover, more and more frequently host families question themselves about the service they offer and this also emerges from the idea of emulation that urges them to be considered the best. Certainly, a house like that of the Buftea family is taken as an example of elegance and conversing between neighbours, the hosts are constantly trying to find out how the houses of the other hosts are made, how the rooms for the tourists are, or how the table is set. Sometimes the tourists themselves become the unconscious carriers of this kind of information.

Recently, some of the host families have decided to invest tourism incomes in further restructuring work, such as a second living unit where they can host tourists during over-crowded times. Olga Petric (my host), in confidence, 'distances' herself from the role of the busy housewife eternally occupied with practical and organizational matters and explains, in a few words, the benefits that she has personally gained from her tourism activity:

> This year we have earned very well with tourists. Next winter we will build a second toilet at home and we might be able to buy a car, if the next year is as fruitful as this one. Actually, I would like to have a big, nice wooden gate because tourists like it very much. They like taking pictures in front of gates and they look at those pictures when they go back home, so they may remember Maramureș and my family (Olga, Romanian).

While tourism income helps families' economies, it introduces inevitable changes to both their lifestyles[19] and houses and to town structures. However, narratives tend to underline the fact that Botiza is a sort of never changing town; tourists themselves want to believe that the modernity they wish to be far from during their holiday may not enter this corner of the world.

The Impacts of Tourism in the Locality

The question of the impact of tourism on host communities has always interested the anthropology of tourism. In the first theoretical works of anthropology of tourism the positions were polarized between those who gave a very positive evaluation of the sector and those who considered tourism in a negative way.[20] Current research tends to see tourism not as the only cause but as a contributory cause in the transformation of identities, and in the social and economic transformation of local communities.

One of the first studies which took into account elements such as power relationships and cultural attitudes towards hospitality, as well as economic criteria, is the work of DeKadt (1979), which is the result of a seminar organized

in 1976 by UNESCO and the World Bank in order to evaluate the social and cultural prospects and effects of tourism in the 'developing countries'. The DeKadt research – which took place in a climate of optimism with regards to the potential development that the increment of tourism promised – underlined that the growth of tourism did not always guarantee lasting wealth for the host country, which on the contrary could experience negative social and cultural repercussions. Some countries underwent the trends of the moment – after a considerable initial development, with a strong social and environmental impact (upheaval of relationships within the community, increase of economic disparity, increased environmental pollution, uncontrolled building development, etc.), there often followed a decline of the tourism destination itself, which was no longer as attractive for various motives (prices too high, deterioration of the places of attraction, market fluctuation, etc.). The merit of DeKadt is that of having critically analysed the reality of the 1970s in which tourism represented a fundamental factor for the economic development of many nations that were considered as belonging to the so-called Third World, and at the same time it demonstrated the enormous variety of the social consequences of such development.

There has been research that has underlined the strategies of the local communities in order to deal with the changes that tourism necessarily generated within those communities, a kind of response from the base to external solicitations. This research often underlined both the forms of local cooperation with regards to the tourist industry and the forms of resistance, more or less direct, that the local communities choose from time to time to utilize in order to try to restrain the supposedly negative consequences of tourism.

In the article by Dogan (1989) on the 'forms of adaptation', several types of strategies are listed with which the local communities respond to the presence of tourists in their spaces. Among these, Dogan includes certain local practices such as the revitalization of customs and traditions for tourism purposes, or, on the contrary, the separation of tourism spaces from local spaces, to the point of producing performances (such as in the case of Balinese dances) that are specifically meant for tourists, and that are different from those for local consumption, necessary for maintaining social adhesion.

Boissevain (1996) analyses the strategies of protection developed by small communities to defend the 'back regions', or the more private areas of their community, from the incursion of tourists. The author refers to forms of 'covert resistance', simulated resistance, such as jokes, derision, but also insults, or small organized actions of resistance, all local methods of hiding and, in some way, protecting one's community from the tourists' gaze. In particular, Boissevain points out that with the growing demand for cultural tourism, tourists try to enter more and more into the life and the practices of the host community. At the same time, the community – while organizing itself to host and thus to 'offer itself touristically' – tries to create an increasing number of internal moments of encounter in order to preserve its integrity, by separating moments of private life, from those shared with the outsiders (Boissevain, 1996: 14).

Both the research studies have shown through ethnographic evidence that the host communities are never mere spectators of the phenomenon of tourism

that others represent before them. On the contrary, when there is an invasion or intrusion of tourists, local people may set the limits of the spaces, make fun of tourists, deceive them about the authenticity of what is offered to them.

The anthropological literature that underlines the specific aspects connected to the themes of the direct relationship between the tourist and the host society is wide-ranging and on the increase. Tourism cannot be considered as a limited field of study but as a discipline that allows a privileged position from which to deepen issues linked to modernity:

> Tourism can be an ideal context for studying issues of political economy, social change and development, natural resource management, and cultural identity and expression. Indeed many of the major questions that concern cultural anthropologists appear in the study of tourism (Stronza, 2001: 261).

Conclusions

The analysis of the rhetoric and the observation of the practices of the tourist encounter have allowed me to grasp a few of the ironies that are part of the tourism phenomenon.

Whereas in the narratives there is a desire for the search of 'uncontaminated nature' that becomes, in most cases, a tourist experience which allows the tourist to re-live experiences linked to the past; in practice an organization can be observed that leaves nothing to fate, that is mindful of detail. This can be seen from municipal policies that aim to encourage those who host tourists, to the reconstruction of public and private works, to domestic decisions concerning the organization of spaces and decoration of the internal and external areas, etc. As we have seen from the ethnographic examples, some of the aspects of the town and local life are purposefully 'valorized' and emphasized by the language and images of tourism advertising, while other aspects are maintained in the private sphere, and constitute the background that cannot be shared with tourists.

In Botiza, the local community is going through a period of transformation which is rather rapid, of which tourism certainly represents one of the factors of change, so that it is possible to observe practices and behaviour in *everyday* life that are extremely differentiated. The ambiguities that continually emerge from my research study are examples of the particular period of transition that, at a more general level of political and economic order, the population is going through, and of which tourism is one of the outcomes.[21]

My fieldwork has coincided with a period of transformation from a very recent past, in which there were very few tourists and only a few projects by far-sighted people, and the current time in which the tourism demand is growing exponentially from year to year and thus requires a capillary organization with regards to the offer. In just a few years Botiza has witnessed such an enormous and, above all, increasing number of tourists that, in order to maintain the advantages brought on by the income from tourism, it has had to review certain social dynamics within the community, so that it could organize itself to be able to deal with the increasing tourism demand. Such process, that sees the local

community in its internal components as a protagonist, is still taking place and, at this point, it is too early to make final conclusions.

However, one can try to think over some of the dynamics through the practices and the strategies adopted by the various actors who gradually adapt themselves and, at the same time, build change. In this way, also the habits and the objects of 'traditional' use are re-examined in order to deal with a situation that is constantly evolving. As various authors have underlined[22] (Lanfant *et al.*, 1995; Barberani, 2006; Simonicca, 1997), at local level tourism can be considered a 'total social fact' since it introduces changes that redefine local dynamics leading to major alterations in the social structure.

Far from being concluded I intend to further my research on this work and to keep on with this analysis by considering those elements that drive local people to self-examination within a steady, daily process while the tourist industry moves on with its attention to tourists' needs, wishes and expectations.

Endnotes

[1] Fieldwork was carried out from 1999 to 2001 in several phases.

[2] The current administration is much smaller than in the past, two-thirds of the territory belonging to the Ukraine. The present borders are defined by law n.2 of 1968.

[3] The works I referred to most are: Cuisenier (1995 and 2000); Mesnil and Mihailescu (1998); Mesnil (2003); Papa *et al.* (2003).

[4] A French tourist, Anton, went to Botiza for the purpose of seeing certain species of orchids that are extinct in other European countries.

[5] In the Maramureş region the villages are often located along a river. Constantinescu (1999: 66) distinguishes between ancient villages with irregular forms with houses scattered on the hills and along the river valleys, clusters of villages and villages built according to a pre-ordained plan, in particular aligned along the road, the latter being a typology which was adopted mainly by the Saxon villages in Transylvania.

[6] "Es war und ist einmal ein Dörflein Namen's Botiza" (from the Internet web site http://home.t-online.de/home/maramures/).

[7] This expression is part of a specific kind of rhetoric used by tourism publications, which underline how the visitors to the places referred to arrive as tourists and leave as friends. For further investigation on this topic see Cipollari (2005a, b).

[8] At the end of the 1990s, a Belgian association started in Romania against the territorial planning promoted by Ceausescu, which implied the destruction of rural villages in order to settle the inhabitants in urban agglomerates.

[9] As he argues in an interview: 'Initially I saw how things were with the director of OVR of Vadu Izei [the first locality of Maramureş involved with the activities of OVR], then I decided that I had to do something to make also Botiza better known because it had enormous potential. In 1995 I drove my Dacia [automobile] to Brussels at my own expense, I spoke to the director and I told him that Botiza, as well, is very interesting, has a very high level, and it has potential. In 1997 we succeeded in putting together our resources and now Botiza is part of the OVR.' (Petru, Romanian).

[10] Mrs Ioana Trifoi, candidate of the PDSR party, that had just won the elections on the 4th of June 2000 for the second term.

[11] The interviews in this paper were recorded by the author during fieldwork from 1999 to 2001, all transcripts are taken from the PhD thesis 'Il turismo rurale a Botiza (Romania). Costruzioni della località e interazioni nell'incontro turistico' by Chiara Cipollari (2005a), available at the University of Siena Library.

[12] Motivations that are similar to those that have led to the creation of natural parks.

[13] This expression is part of the way many tourists describe Botiza, but it is also a slogan used in a tourist brochure produced by OVR: 'Many Maramureş villages appear to be out of a fairy tale frozen in time with men and women dressed in traditional folk costumes, with many small farms worked by hand and quaint wooden houses and churches'.

[14] With the prospect of Romania joining the EU in January 2007, numerous programmes have been set up which offer the possibility for villages like Botiza to participate in selection procedures for funding of projects which have the aim of local development. For example, the administration has participated in the call for the proposal for the maintenance and asphalt surfacing of the roads. According to the point obtained on the basis of criteria taken into consideration (usefulness and applicability of the project, the possibility of creating jobs for locals), the project will be examined among others and possibly be funded. According to the Mayor, the present problem of the administration lies in the lack of training in project management, therefore they do not have people who are able to work on projects with parameters set by the international organizations.

[15] The hand water pumps were installed at a fixed distance from one another in order not to disadvantage anyone. However, from informal talks with locals it came out that the houses that host many tourists were favoured with respect to others, by the fact that the pumps were closer to their gates.

[16] For example, in 1999 a university professor in Cluj, with an average career level, earned about 200 dollars a month; a labourer or waiter between 70 and 90 dollars a month. Again in 1999 a tourist host in Botiza earned 15 dollars a day for a standard accommodation service (half board and lodging).

[17] Local currency before January 2007 when Romania entered the EU.

[18] Often this is a small wooden hut called locally *wc de lemne*, without running water and with a basin. It is set within the courtyard, near the houses, often along a course of water.

[19] For example, I am referring to the gender roles within the family, as well as the relationships between neighbours that have necessarily been transformed with the growing number of tourists hosted as a result of a different distribution of income.

[20] Among the research studies that underline the negative effects of the advent of tourism, the work by Arrones Jurdao in 1990 (in the region of Mijas, Costa del Sol, Spain) can be cited. It starts from a perspective of economic anthropology in order to affirm that the development of residential tourism has produced many difficulties for the locals, at the environmental impact level, such as the scarcity of water, as well as at the social level, because of the highly conflictual relationship between the new and old residents, resolved against the latter (Nash, 1996: 28–32).

[21] In this sense I agree with Macleod who argues that 'Tourism is one feature of globalization that can be extraordinarily powerful in terms of its impact on a host community, and its diversity must always be considered when examining it as a phenomenon' (Macleod, 1999: 454).

[22] According to the post-lévistraussian scholars, tourism is the modern version of the Maussian 'total social fact' since its pervasive character is able to affect people's behaviour from the outside, acting on a double level both macro- and micro-systhemic (Barberani, 2006: 57).

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10 A Contextual Approach to the Power Relation Between *Tourism* and *Development*[1]

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Introduction

Tourism is one of the names of power. The noun *tourism* is the discursive form given to the complex set of symbolic and technical *dispotifs* (devices) that, linking the visible and the expressible (Deleuze, 1986), allows certain groups of people to spend their leisure time away from their quotidian, including what they do at those places and the processes induced. Actually, *tourism* produces meanings and realities, especially in those contexts where its economic potentialities are emphasized as the sole mean for development.

In Carboneras, for instance, a small coastal village in the desertified south-easternmost province of Almería (Spain), the hotel *Azata del Sol* with more than 20 floors and 411 rooms and a resort of seven more hotels, a 18-holes golf course and 1,500 condominiums was being built just 28 metres away from the shoreline in the beach of *El Algarrobico* within the limits of the Natural Park of *Cabo de Gata-Níjar*. However, the Supreme Court, on November 2007 announced that the entire resort was to be immediately demolished. This followed environmentalists' legal actions and public opinion campaigns in the media, which pressured politicians. Against several protest marches with thousands of local demonstrators in support of the development project, the *Junta de Andalucía* (autonomous government of Andalucía) reassessed the area as 'land protected from building'. However, other forces were at work. In the name of the 'general interest' and to 'ensure the social and economic development of the province', all the three levels of the Spanish administration system had, over a period of 20 years, backed this immense tourism project and gained great political benefits. In 1999, the *Junta de Andalucía* sold the plot to the developers, approved the *Plan de Ordenación de Recursos Naturales* (PORN – Natural Resources Planning) of the Natural Park of *Cabo de Gata-Níjar* in 1994, subsidized the project in 2002 within the Sustainable Development Plan of the Natural Park and had a stake in the venture. The local government had

authorized the construction and exempted it from municipal building taxes and duties in the late 1980s. And the State Ministry of Environment failed to enforce the 1988 Coasts Law on time.

In a piece titled 'the demolition of a hotel and of the hopes of a village' (*Ideal*, 26 November 2007), a local columnist wondered whether after all these years of great expectations any of the environmental impact statements recently revised had included the social and cultural consequences of this tourism *development* project? Whether the hotel was constructed in the Natural Park according to the PORN as argued by environmentalist groups, is a political issue? Whether the *Plan Urbanístico Parcial* (Partial Urban Development Planning that permits the buildings) was approved before the *Ley de Costas* (Coasts Law) came into force on 1 January 1988 establishing an area up to 200 m inland from the coast where some construction restrictions are in place, is a legal matter. To understand why the villagers demonstrated in favour of the project and against the governmental order of demolition and the environmentalists' arguments is, alternatively, a straight anthropological research subject.

Carboneras is not the sole example of conflicts over land use in tourism environments. Different ethnographic accounts show how competition for the foreshore happens in Indonesia, Norway, the Canary Islands or in some spot of the 24 km of the Slovenian coast (Boissevain, 1996; Boissevain and Selwyn, 2004). Also, the mediation of leisure activities in the signifying process has already been considered in the production of landscapes (Aitchison *et al.*, 2000). And the spatial relation between power and tourism has been analysed, at some depth, by political economists (Britton, 1982) and from a post-structuralist perspective (Church & Coles, 2007) to name just the classic and the latest works. In Zahara de los Atunes, a former fishing community in the southernmost province of Cádiz (Spain), the Minister of Environment himself spectacularly enforced on 10 January 2001 the Coasts Law by blowing up with 175 kg of dynamite an unfinished 1970s hotel. Broadcast as a government achievement in the 'recovering of the seashore' programme. In the same location there is now an impressive tourism resort that includes a golf course, hotels, and *urbanizaciones* (summer private neighbour communities) with some hundreds of condominiums. No local demonstrations against these constructions have been made, although some bloggers and environmentalist groups have raised certain, predictable complaints.

A comparison between the Munxar consortium and the Hilton project in Malta leads Boissevain to conclude that locals' reactions partly depend on the stage of tourism development, for in certain locations 'inhabitants [are] resigned to the congestion, and many depended on the tourist industry' (2004:254). Gill shows how the power relations shift as the resort community grows and evolves along several phases of residents' involvement: from a pro-development attitude to a concern on environmental, social and economic sustainability on the spatial pattern of development (2007:132–134). Yet one of the main questions remains unresolved. Why is that in some places locals are willing to accept tourism development projects and to defend them against any detriment, and in other locations these projects find the absolute opposition and rejection of the people *at some point* of their implementation? To think that a fracture in the continuity

of the production of meaning may explain it, it seems quite an intriguing working hypothesis to consider, as this chapter will show.

It is essential to inquire into the social and cultural processes involved in those contexts where tourism is presented and valued as the main road to economic progress, if any possible contribution from the humanities and the social sciences is ever to be made. Thus, it is argued for a theoretical scheme to assist both researchers and policy makers doing their work in tourism environments. From this perspective, the complex set of symbolic and technical *dispositifs* called tourism, should also be dissected as a powerful mediator in the production of meaning and realities. Hence anthropology should revisit culture as the central notion of the discipline. It must distinguish unambiguously between 'valuing' (*poner en valor*) selected cultural features as heritage (*patrimonio*) and 'making culture worthy' (*dar valor*) by stressing the importance and usefulness of ensuring the continuity in the production of sense and meaning for human development. When concerned with the process of implementation rather than on the academic feed-back analysis of tourism impacts (Nogués, 1995; Jenkins, 1999), anthropology should focus on the absorbability of culture within the dialogical appropriation through use of tourism *dispositifs* (Martín-Barbero, 1987) rather than on the cultural resistances to tourism strategic and ideological mechanisms using dialectics. Besides, this distinction helps to ponder *from where* (whose standpoints?) those measures are being designed and *to where* (to whom?) such measures address. Are specific actions planned *from the inside* or *from the outside*? Moreover, are these addressed *to the inside* (intended to meet locals' expectations and needs) or, conversely, *to the outside* (satisfying visitors' demands and motivations for travelling)?

In order to acknowledge how anthropology can contribute to the welfare of people facing tourism as a vehicle for development, the question of why *at some point* of the tourism development process locals (or some local groups) detach themselves from it, must be answered in the first place. This is the challenge. Then, it might be a good idea to start from the beginning. Probably.

Anthropological sketches on tourism

Anthropology is already an old social science whose object of study is amphibologically referred by *culture*, whose approach is comparative and holistic, and whose aim is to understand social groups in their becoming. Hundreds of definitions of culture have been made since Tylor's (1871), but very few of them have been successfully implemented in tourism studies or development studies. This might be because, currently, most of ethnographies on these themes are problem-oriented and theoretical thinking is hemmed into the politics of definitions. Notable criticism over the lack of theorization (Franklin and Crang, 2001), the individual efforts of researchers and the peripheral situation of certain groups in tourism research has appeared (Lengkeek and Swain, 2006), and has led some authors to call for a post-disciplinary movement towards the production of knowledge in tourism studies (Coles *et al*, 2005). This chapter positions itself within these trends. Hardly any of the numerous books,

articles and reviews on tourism, cultural heritage or sustainable development published each year examines culture as a central notion to the arguments. Therefore, culture appears too often as a polysemous noun whose operational meaning is, in the best case, mutually presumed by the author and the reader or, at worst, cloaked by a postmodern writing style.

If anthropology is to comprehend social life holistically, then, the discipline must retrace itself back to culture and to its dialogical production/reproduction. Rather than questioning whether there is such a difference between tourism and culture (Rojek and Urry, 1997), what is actually meant by 'cultural tourism' (Richards, 2001), what is to be sustained in tourism development (McCool *et al.*, 2001), whether 'culture' may offer variety and the possibility of tourist product differentiation (Boniface, 1999) or what 'community' is being referred to when addressing community-based-tourism (Hall and Richards, 2000), to name just a few of the usual debates, anthropology should allow for an important distinction in the way of approaching that complex set of *dispositifs* that have been textually reduced to one term: *tourism*. Tourism has been basically explained as a 'business' or as a 'phenomenon' and, still, the issue about its precise meaning remain unresolved (Burns, 1999: 23–37). Besides on the capital concentration as a characteristic, the general agreement on which are the four elements of the tourism-related system (travel demand, tourism intermediaries, destination characteristics and consequences) to be studied, does not avoid that the lack of precision seriously reduces the potentialities of anthropological analyses and their possibilities of implementation. I suggest that another effective approach would be to see 'tourism as a context' (Nogués, 2003).

Within this conception of tourism as a context, researchers may find two lines of research particularly interesting. On the one hand, as Boissevain's edited book ethnographically demonstrated, to understand what is tourism, how intercultural processes work, and how 'development' planning can be carried out, social research should focus on one pole of the host-guest tourist continuum: 'in the so-called hosts, the people who both service tourists' needs and are the object of their attention' (1996:1). Though still a traditional view on the anthropological study of tourism, the book sketches the need for a change in perspective towards Gramsci's positions. What happens when tourist destination villagers are tourist themselves elsewhere? Can anthropology study the changes in *destination culture* only as *a reaction* to tourist arrival or, quite the reverse, are those produced through the mutual power relation between visitors and local residents? If tourism is analysed as a vehicle that eases the globalization process and as a homogenizing agent, why is it that the tourism industry cannot ensure the success of a tourism type in a certain destination that easily? The importance of taking into consideration a dialogical perspective is basic for at least two reasons. First, to comprehend holistically the social and cultural complexity of human groups dynamic and, second, to answer whether any specific measure is sustainable or not according to local needs and hopes, i.e. their culture. As Timothy posed, anthropology should study those to be empowered so they are able 'to initiate (i.e. authorize) their own development goals and programmes' (2007:204).

The second line of research would overcome the sterile debates on definitions and on whether this practice or that measure could be qualified as 'sustainable

tourism' or 'cultural tourism'. Since movement is shown while walking, neither 'sustainable tourism' nor 'un-sustainable tourism' (not even tourism!) exist independently of the practices that are to be named as such, academics concerned on tourism development implementation must reject logomachy. In its place researchers should devote their analytical efforts to comprehend those practices that give meaning (content) to the labels and to the labelling process itself. It is a political issue (an institutional power matter) to decide (to name), for instance, whether the present tourism development practices *are* 'sustainable tourism development' (STD), or which STD policies and measures should be implemented in the inland *comarcas* (administrative ensemble of neighbouring municipalities) in the Costa Blanca (Alicante – Spain). Looking at 'what people say they do and what they actually do' is the most used to understand the value/ideal system of a society. And entering the politics of definitions through the looking-glass of 'how people call what they do and who names it' tracks power down to the level of discourse and locates anthropology far away from the observable and daily practices. However, to examine *what do those that say that they do* links the realm of discourse production with the daily practices that produce and reproduce meanings; while unveiling the strength of the most vivid and distinguishing of all the anthropological methods: the participant observation. To scrutinize how lives evolve and how to achieve its meaning is quite a helpful way to understand why so many tourism development projects fail *at some point* of their implementation process to encompass the local community.

Because I partially agree with Hughes that 'the solution of the environmental crisis of tourism does not rest solely with *scientific management* (emphasis added; quoted in Bramwell, 2004:32), I propose a comprehensive and contextual approach to the destination's culture. I assume that tourism can definitely play an important role in regions where traditional economic activities are in downturn (Reid, 2003) and that there is an inevitable mass-tourism mode-of-production in the European Mediterranean coasts. Consequently, I suggest investigating the production of meaning and sense in contexts where tourism occurs or is the desired outcome: privileging pragmatics over semantics. Instead of playing the role of tourism development managers and agents, I suggest a focus on how central notions such as sustainability, development, tourism or cultural heritage acquire their meanings through social practices in specific contexts.

In accordance with this, what do I mean by culture? In plain terms, social anthropology is a discipline that studies the diversity of human groups in all the spheres of the social life: their expressive and rational manifestations, the transformation of and their adaptation to territories, the modes of social relations, what is said and what is done. It analyses, in short, the compound of social practices, contexts, realities and facts that *gives sense* to the process of life in society. Culture, thus, is that compound of manifestations, modes, what is said, what is done, circumstances and contexts that *acquires its sense* within a specific group and *gives sense* to the social life (either traditional or fluid identities). Thus I contend that any planned tourism development process can only be felt as one's own if the process maintains those historic and cultural memories that *give sense* to quotidian-ness and that qualify the territory making it the locals' property. The standard development processes do not take into account that society is a process

and fracture the idea of cultural continuity (Mandly, 2002:208). Consequently, any STD must pay attention to the continuity in the production and reproduction of sense (culture itself) designing measures to preserve the most of it. This chapter must be read from this point of view.

Tourism and development

It is widely accepted that current STD programmes are anything but sustainable and that sustainability has become a state-of-mind (Blühdorn, 2002). Daily practices of tourism development --that is, those actually implemented by local agents in tourism destinations-- transform 'nature' into 'environment' and/or 'culture' into 'cultural heritage' '*patrimonio*', a metonym of culture-- and are discursively thought according to the market economy and the economic logic of accumulation, interest and benefit (du Cros, 2001).

During the World Decade for Cultural Development (1988–1997), UNESCO emphasized the importance of cultural heritage as a means for economic development. The European Union stressed culture as a development resource for the regions through financial initiatives and programmes such as LEADER, PRODER or RAPHAEL. Moreover, the UN World Tourism Organization (UNWTO) called the attention to culture as determinant of the growth of tourism consumption. From then on, 'culture' appears as a keyword that organizes politics and the binomial culture-tourism has become a token for STD discourses. Because of this, the UNESCO declarations of World Cultural Heritage are everywhere politically and administratively managed as tourism slogans for increasing tourists arrivals (Harrison and Hitchcock, 2006). In most tourism destinations the policy-making actively transforms social and cultural meanings into resources either through the commercialization of natural landscapes and cultural heritages such as in the revised Tourism Master Plan of 1989 in Malta (Boissevain, 2003:99), or through the management of a modernization discourse in urban planning as shown in the case of El Puerto de Santa María in the south of Spain during the last 15 years (Nogués, forthcoming). Since the early 1990s, the tourism policy of the *Junta de Andalucía* has sought to expand the offerings beyond traditional coastal and summer tourism. This included an ambitious programme to face the challenges of the new millennium within a global free-market economy: the Plan for the Integral Development of Tourism (1993) and the General Plan for Cultural Assets (1997). In this context, the economic transformation of culture into cultural heritage pursues the STD, and the mercantilization of the Andalusian intangible discursively appeared as the unique reality (Nogués, 2002). This 'metacultural product' (García, 1998) labelled *patrimonio* by the *expert-ness*, or *culture* by the tourism industry, became a key element for human development in tourism contexts. In several international conferences, the UNWTO considered the new potentialities of cultural tourism. In April 1999, at the meeting held in Uzbekistan, the question addressed was '*how can Humanity draw upon the vast reservoir of tourist demand as to benefit the heritage?*' In 2001 the WTO published *Cultural Heritage and Tourism Development*, and in February 2006, the meeting in Yogyakarta (Indonesia) dealt with *Cultural tourism and local communities*. As a result of this global move from

'nature/culture' to 'environment/cultural heritage', tourism dynamics seem to have turned centre-periphery models over by stressing the pragmatic side of culture either as a resource or a commodity, or a means for social redistribution of wealth and poverty alleviation, or for territorial equilibrium. What leads us to an interesting paradox in development planning: periphery now owns the *culture*, while the centre keeps administering the *expertise*.

The people colonized by the West were usually defined in terms of the lack of culture as barbarians or savages; and the legitimating of such colonial system was done in terms of the need for civilization or evangelization; even for the refinement of a bourgeoisie culture as the rhetoric figures analysed by Said (1993) shows. Simultaneously, along with the democratization process of leisure time and tourism consumption in Western countries (Chadefaud, 1987; Furlough, 1998), the notion of culture smoothly shifted to include almost exclusively what people made, and was ultimately materialized in what could be consumed by visitors (artefacts, performances, food, attractions…) as Horkheimer and Adorno's 'culture industry' illustrates (1944). At that time, 'culture' distinguished (in Bourdieu's sense, 1979), and discriminated against people in terms of its lack or its way of consumption. Later it has become one of those keywords that, according to Williams (1976), organizes politics within those ideoscapes proposed by Appadurai (1990).

Current hyper-industrial mobility has brought to the metropolises those formerly uncultivated people, and cultivated people have flown to peripheral and semi-peripheral areas. Touring cultures may have blurred the differences between tourism and culture by de-differentiating the correlation between culture and society as Rojek and Urry (1997) have suggested[2]. Notwithstanding, this 'post-colonial' hybridity 'as if colonialism had finished-- has developed into a 'neo-colonization of quality space' rather than into a sociocultural merging in the Spanish Mediterranean coasts (Gaviria, 1974, 1976; Jurdao and Sánchez, 1990; O'Reilly, 2000; Aledo and Rodríguez, 2002; Mazón and Aledo, 2005; Haug *et al.*, 2007; Nogués, 2007). This presence of outsiders has eased the appearance of a socio-spatial stratification through the mushroom-type urbanizations and secondary residences, the construction of strong community boundaries among foreigners, a revived demonstration effect among Spaniards, and has submerged many tourism development policies under *techno-tropism* – a peripheral way of referring to what Dann cryptically calls 'language of tourism': the prevalence of a paradigm that assumes the modernistic qualities of monologue and social control that pervaded the industrial society, and leaves little or no voice for the demanding visitor or the visited (Lengkeek and Swain, 2006). In other words, *techno-tropism* not only defines local culture – whatever that may be today – according to the capital and broader geopolitical interests, but understands it and administers it through the instrumental knowledge of the visitors drawing up the boundaries of what is it for and how to preserve it. Current tourism policies conceive culture only in its metonymy (*patrimonio*) and not as the compound that gives sense to social life. In most tourism contexts culture it is not commoditized, but mainly deprived of its transformative power, what makes a regenerative development planning impossible.

The ethnological-friendly approach proposed in these pages is born out of these neo-colonial processes and aims to understand them. Derived from

Foucault's notions of knowledge and power, the 'post-colonial' prevailing discourses and the use of Western *expertness* development planning (Powell, 2006; Summer, 2006), this analytical model stresses the study of mediations and the dialogics of cultural receptions (Martín-Barbero, 1987) rejecting to enter into the essentialist commoditization debate.

Culture in Tourism Contexts

Particularly among classic anthropologists and sociologists who dealt with tourism, the idea of clashing societies or cultures in conflict is still prevalent (Núñez, 1963; Smith, 1977; and to some extent Robinson, 1999, and Rojek and Urry, 1997). Acculturation theory ontologically conceives cultures mainly in its territorial (spatial) dimension and, consequently, also as mere recipients where tourists' land for 'grazing'[3] and the tourism industry, poured by capitalist forces to foster and preserve underdevelopment, creates 'peripheral enclaves' (Britton, 1982)[4]. This reductive vision of what a culture is, has caused tourism research to be theorized in terms of static models (Meethan, 2003) and has kept tourism researchers focusing on dialectics rather than on dialogics; in so doing, both the anthropological understanding of sociocultural processes in tourism contexts and the production of knowledge have been limited.

Contrary to dialectics, many ethnographic accounts demonstrate how tourism-receiving societies daily structure their interaction with outsiders and cope with tourism and tourists in many diverse ways (Boissevain, 1996). At this point it is interesting to note that, somehow, the differences in the implementation of tourism development programmes at the central Western countries (i.e. Europe) and those at the periphery, resemble and reflect the interiorizing of the roles of the colonized and of the colonizer. Destinations in Europe show how, for instance, at the Stockfish festival in Norway (Puijk, 1996:219) locals attend the festival as something vivid because 'most of them also have holidays and are regularly tourists in other places'. In The Netherlands the construction of a local narrative, closely intertwined with their own experience of being a citizen of Amsterdam, is not the detached narrative of the tourist industry, but one linked to the popular culture of the city (Dahles, 1996:244). Also in Europe, Odermatt (1996) demonstrates that Sardinians in the village of Abbassanta may agree with the commercialization of culture ('cultural heritage'), as being a question of pride, but many may not accept outsider management of the same heritage. Though this case refers to a prehistoric monument, it might be accepted that an ethnologically-friendly approach to tourism development must pass through the management, not only of the resources, of course, but also principally of the meanings. Furthermore, to talk of the production of meanings is to talk about power and politics.

The dialogics of tourism space

The scheme helps to understand sociocultural processes in tourism contexts. It analyses the dialogic relations that exist between, on the one hand, the macro-

social conditions imposed (a) by the physical presence of the tourism industry in form of lodgements (hotels, apartments, urbanizations), restaurants, leisure enterprises or transport companies, (b) by the symbolic presence of the *dispositifs* of ideological dominance that condition the desirable, and (c) the instruments of institutional power (governments, city councils, mass-media, entrepreneur associations, etc.) that condition the feasible, and, on the other hand, the possibilities generated from the microsocial as shown in what is said and what is done by the people. *Tourism space* is the outcome of the relationship between these macro-social structures, theorized as constrictive, and the microsocial practices, considered as capable. This reminds us of Chadefaud (1987) for whom tourism space represents in time and space the projection of the ideals and myths of global society, and converts goods into tourist products and territories. Therefore, it appears a referential frame, furnished by those images and values that *give sense* to everyday life, through which social practices are understood.

Understanding this dialogical model requires partially overcoming the centrality of the equation 'culture equals territory' (derived from the acculturative perspective and the *hic et nunc* functionalist axiom), and distinguishing the spatial –locative– dimension (the *tourism environment*) of a society from that of the expressive dimension of culture (Bakhtin, 1965). Consequently, social theorists ought to differentiate (therefore, name) both dimensions methodologically, to arrange the data (actions, practices) observed and collected during the fieldwork, and to analyse them in their proper context. Only by doing this will social science be able to provide perspectives distinct to those derived from the *expert*'s administration of the desirable.

Fig. 10.1 charts the model: imagine a dynamic graph progressing from left to right. Imagine that visitors land in a place where there is already an existing

Tourism Space
(meaningful mediator that gives sense
to the *Tourist Setting* and to the *Place*)

Tourist Setting
(expressive dimension
of the visitors)

Place
(spatial and expressive
dimensions of the
residents)

Negotiated Ground

Tourist Territory
(spatial dimension of the
visitors)
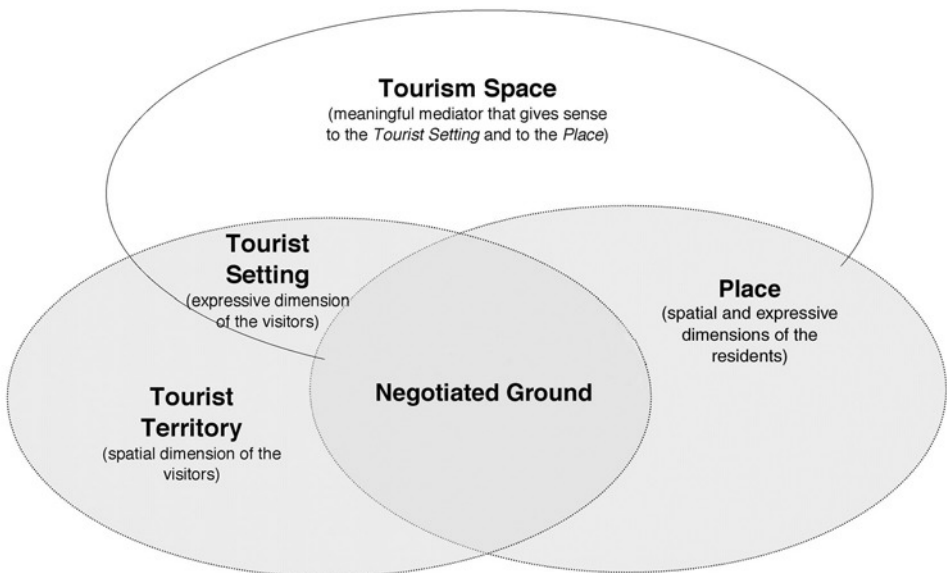
Fig 10.1. Theoretical model of the 'conversion of place through tourism space'.

society. Imagine now that the place shrinks as tourists gradually consume 'quality space' by means of services and accommodation facilities for visitors. Then, in the spatial dimension appears (1) a 'tourist territory' where these premises can be located on a map, and (2) a 'place', that indicates where insiders dwell. But tourism also consumes local culture. Therefore, in that Bakhtinian expressive dimension of culture, it might be possible to distinguish (1) a 'tourist setting' from where tourists are seduced to find their motivation to travel, and (2) a 'place' through which locals express themselves as a meaningful group (i.e. community). The resulting 'negotiated ground' in both spatial and expressive dimensions suggests the dialogics and the diachronics of the model. The corollary of the conversion --neither simple transformation nor occupation-- of the place through the mediation of tourism space occurs when the 'place' is perceived, experienced, interpreted and understood through the perceptual and expressive world of the visitors; when, progressively, tradition vanishes as cultural amalgamation and is managed for residents in the same way as it is for visitors; when, in the end, the 'place' converts through 'tourism space' and the profitable meanings of the tourism industry appear as the hegemonic discourse in the most diverse cultural, social, and economic daily activities and locations (Nogués, 2006).

To approach the study of cultural processes within tourism contexts from this model is different to what Selwyn calls the study of the *transformation processes*. He is interested in the way that the 'raw materials' of tourism (particularly land, labour, raw materials themselves and the body) are transformed within the processes which are either or both politico-economic and ideological in character (Lengkeek and Swain, 2006). This is similar to what Duim expresses with his analysis of *tourismscapes*: the complex processes of association and ordering people and things (Duim, 2005). The conversion model would explain even those cases where 'a state characterized by an axiological confusion between what belongs to culture and what pertains to tourism' as Balinese authorities themselves call *kebudayaan parawisata* (tourist culture) (Picard, 1995:57).

I argue that the generation of *tourism space* cannot be analysed as a mechanical reflection of any infrastructural or discursive determination, nor as a dialectical synthesis of the inner contradictions of the tourism system, but should be analysed as a dialogical process. As said at the beginning, the working hypothesis states that tourism space is neither a product directed against the native population of a certain destination defined as peripheral by the neo-colonial ideology of capitalism; nor the resistance soil of imagined communities that reacts against the invasion of their homeland and *their* culture; nor the space created by Frankfurtian-like contrivances that alienate hyper-industrialized societies through leisure time management. To understand the transformative capabilities (hence, regenerative) of the dialogical processes of meaning that gives content to tourism space, anthropologists must attend to the reception. This is, to deeply comprehend the cultural dynamics in tourism contexts, academics concerned on the implementation of tourism projects as a social development mean cannot analyse only the tourism process as coming from the *outside* (be it tourist agents, neo-colonial capital, hotel chains, or cultural tourism

experts) and think of it only as something *towards the outside* (be it tourists or incomes). On the contrary, anthropologists must look at how the residents of the destinations *make sense* of their own processes in society – 'popular culture', and, additionally, how they themselves appropriate (absorb) those *dispositifs* that construct the masses (be it either tourism, mobile phones, Internet…) through its use and avoid the dissolution of that popular culture implied in the very same construction of the masses (Martín-Barbero, 1987).

Some ethnographic examples

Let me illustrate the argument with a picture (see Fig. 10.2). The photograph was taken deep inside the *Axarquía*, an Andalusian *comarca* in the *hinterland* of the *Costa del Sol* that deepens its most precious historical memory in the times of the Castilian conquest of *Al-andalus* at the end of the XV Century and the subsequent uprisings of the XVI. The board is an invitation, truly full of historical discontinuities, to enjoy the relaxing atmosphere under a carved panelled ceiling at a *mudéjar* inn along with the exotic savour of the typical *mozárabe* cuisine, as well as of the globalized taste of international cooking. This billboard, however, offers the possibility of getting closer to the cultural processes in the tourism environment of the Axarquía, at least, from two perspectives. It can be underlined the historical confusion between the Christian-Visigoth culture of the *mozárabes* under the Cordoba Caliphate rule during the IX Century, and the *mudéjar* culture of those Muslims that lived in the Christian kingdoms of Spain until 1502 when the law baptised them as *moriscos* (Christianized Muslims). This

Fig 10.2. Historical mixture (*mestizaje*) in tourism contexts. Costa del Sol, 2001.

mixture of times and cultures may result too offensive for critics who conceive of tourism only as an external phenomenon that commoditizes culture, fractures the complex world of meanings, uproots historical memory, de-structures social groups and, eventually, unifies every culture under the umbrella of 'international cuisine' as a metaphor of a global and de-localized world.

On the other hand, the billboard also allows to focus on the dialogics of the cultural processes in tourism contexts, as it demonstrates the appropriation of the historic-cultural sense using it as a tourist catchword. This cultural tourism venture (if anyone dares to name it in such way) claim for the friendliness and hospitality that, in the mythical past, supposedly characterized the ancient hostelries that lodged travellers, muleteers and wayfarers. To understand the message of this board fully, anthropologists must look at it through the meanings produced by tourism space.

Against the de-personalization of the overcrowded *customer* service that distinguishes the majority of the hotels-restaurants in the *Costa de Sol*, the *posada-mesón* at Archez offers (starting with the redundancy of the title: inn-hostelry) a distinguishing and personalized service to each of the *hosts*. Following Garcia Calvo's distinction of the two worlds of significance, the invitation clearly refers to the world of the linguistic production: the world *on which* we talk. Yet, the content of the billboard itself performs an astonishing capacity of appropriation of the key traits of the tourism industry (hence its focus *towards the outside*) but starting with the historical essence of the *comarca* (designed *from the inside*). Such a sign comprises the absolute strength and richness of the *mestizaje* (mixture), and is evidence for the role played by the negotiation of meanings in the production and reproduction of culture in tourism contexts.

During my fieldwork in the Axarquía, I collected several other examples of this appropriation of the production of new meanings through use. Probably one of the most remarkable one was that hand-written road indicator pointing to the *Ruta del Socavón* (route of the roadway full of holes in the road surface) next to the official one that indicates the airport. In a tourist territory such as Andalucía or the Costa del Sol, completely traversed by hundreds of tiny and detailed tourist routes (route of the sun and the avocado, route of the olive oil and the hills (see Fig. 10.3), route of Washington Irving, route of the southern Pyrenees, route of the *almorávides* and *almohades*…) this sign acts as an ironic complaint-sheet. It points at both the authorities that do not pave the road and gets to the heart of tourism's unique concerns: the tourists and their facilities. On another occasion, a goatherd I met by the road clearly differentiated between the metric system and the traditional *fanegas* ($6.400m^2$) depending on whether he was referring to how many plots could he get out of an hectare (the world *about which* we talk), or he was just telling me some happenings and family stories (the world *from which* we talk).

Analysis of and control over the mediation role of this tourism space is, for these reasons, one of the few ways to stop the fracture (or discontinuity) in the production of sense, and to give the production and reproduction of culture its own position. 'There is–as Odermatt concludes–another kind of economics to be taken into account in the analysis of tourism development' (1996:98).

Fig 10.3. Fracturing continuity: a territorial dilemma at a crossroad … where to Granada or where to Málaga, 2001.

Redefining tourism development: 'from the inside to the inside' by 'making culture worthy'

Applying the dimensions and spheres of the analytical model, several ethnographic examples reveal that in order to make an appropriate social development planning in tourism environments the measures should take into account *from where* the actions over culture are designed and thought, and *to where* these actions are to be addressed to. There are examples of this dialogical redefinition of meanings both in tourists producing societies located at the core, and in 'touristified' societies in the periphery. For instance, the authorities of Abassanta (Sardinia) acknowledged the feasibility of 'from the inside to the inside development practices' when preparing a photographic exhibition to recover the prehistoric monument in order to 're-discover Losa' not only for tourists but also for the residents themselves (Odermatt, 1996:102). In the contrived *techno-comarca* of Bonaigua (in the *hinterland* of the Costa Blanca in Alicante), the villages celebrated a traditional gastronomy festival in non-tourist season both for visitors and residents (Nogués, 2006), thus making the local

culture worthy. In Amsterdam a group of seniors faced the de-contextualization offered by the guided tours along the canals, and recalled their own experiences to share them with the visitors through the inner spirit of *Mokum* (Amsterdam) (Dahles, 1996). Conclusively, in Bali the local authorities uphold the *balisering* (balinization of Bali) with the intention of recovering the spirit of the island for the Balinese people (Picard, 1995).

Everyone would agree that the road indicators (see Fig. 10.3) of those mythical 'route of the sun and the avocados', or 'route of the olive oil and the hills' are proposed *from the outside-to the outside*: that is, projected by tourism agents with no connections to the place, and thinking only on grazing visitors. On the contrary, the case of the *posada-mesón* shown in the photograph was arranged *from the inside-to the outside*: this is, prepared by someone emotionally and culturally tied up to the place and its history but bearing in mind the visitors' expectations. Regardless of this important difference, in both cases, the tourist re-presentation of accurate features (there were *mudéjares* in the XVI Century, and there are olive oil and avocados in the Axarquía today) for tourists do not present them as the result of concrete historical practices, but simply as buzzwords to attract visitors. This de-contextualization of culture directly affects residents' relation to their own historical roots, fracturing the production of a common cultural memory, and making impossible a regenerative social development.

The standard sustainable tourism developments planning barely consider insiders' ideas for two reasons. One, tourism is addressed to bring investments and investors (by definition located in the outside). Two, because insiders, due to the conversion of place through tourism space process, have partly accepted the hegemonic of tourism as the main developer (sometimes the unique agent of development) and have shaped local practices according to it. Alternatively, as Kanbur puts it: 'it is extremely difficult for outsiders to induce policy reform in a country from the outside, for the outside tail to wag the internal political economy dog' (1998:4). Indeed, in most Andalusian *comarcas* tourism space directly influences the way culture itself is produced and reproduced by local agents, to such an extent that tourism investments are seen almost as the unique 'panacea for a stagnating agrarian economy and as a deterrent to high unemployment rates' (Crain, 1996:44). This extended situation forces social scientists to overlook sustainability and to think of new development tourism strategies posed in terms of the continuity in the production of sense and meaning.

Quite the reverse to these developments towards the outside, the ethnologically-friendly approach is generated *from within*. The main aim is not to overcome ancient dichotomies such as 'modernity' versus 'tradition' or 'centre' versus 'periphery' (prevailing in dialectical approaches), but to pore over the production of culture as a meaningful set of signs (therefore, contextualized), and the reproduction of tradition as a meaningful set of shared memories. The challenge is to encourage a community without breaking the sense of cultural continuity that daily shapes it, taking into consideration the dialogics implied in tourism contexts.

Conclusions

Since the late 1980s many different agents have reified culture *from the outside*: social scientists writing on cultural heritage, the *expertness* of countless advisors and consultants, and various international institutions (UNESCO, the European Union, and the UNWTO). In the same way that nature was transformed into environment, so has culture become a metacultural product: cultural heritage (*patrimonio*) to be valued, a metonym of 'culture' thought of as a tourism resource for the 'sustainable' development of many regions in the world. However, this idea of 'sustainability' is addressed *for the outside* and does not consider either the fracture provoked in the continuity in the production of meanings or the social and cultural consequences of such measures.

The analytical model presented here uses an anthropological perspective and brings the notion of culture back to the social science debate on development. It does not intend to decide whether tourism is good or bad, given that this is not a question to solve ethnographically. On the contrary, the model pays special attention to the continuity in the production of meaning within the capitalist mode-of-production in many tourist destinations. It distinguishes between 'valuing cultural heritage' and 'making culture worthy'. This ethnologically-friendly approach to tourism development implies the full recognition of the mutual obligations implicit in the dialogic relationship between residents (host/insider) and visitors (guest/outsider) ruled by the laws of the market and commerce framed by capitalism, as well as the role played by culture as a meaningful set of practices that *gives sense* to quotidian-ness.

The various 'sustainable' approaches basically asserts for the local control over management and decision making – what the neo-colonial discourse calls empowerment – but seldom consider either the anthropological nature of the resources employed ('cultural heritage' as a simple metonym of culture) or the social objective of the 'product' generated by social practices, which are the kernel of the model proposed. For this reason, it is important for human and social sciences to delimit the different spheres and dimensions playing and negotiating within a tourism environment (thus, creating it) and to recognize the fundamental mediation role of tourism space too. Given that this approach intends to surmount the gap between the production of meaning and the management of this very same meaning, anthropology ought to pay close attention to those who are the final beneficiaries of such 'product' both in the instrumental and the expressive spheres of culture. Thus, the scheme distinguishes between the spatial and the expressive dimensions of culture (place, tourist territory, tourist setting, negotiated ground and tourism space) and explains how in many destinations the 'place' is perceived, experienced, interpreted and understood through the perceptual and expressive world of the visitors. I contend that the anthropological analysis of the 'conversion of the place through the meaningful mediation of tourism space' helps to understand better the social and cultural processes in tourism environments. Consequently, it allows new types of actions and measures for the social development of tourist destinations that are thought *from the inside* and are addressed *to the inside* to

be designed. In sum, the model vindicates the transformative power of culture, i.e. a regenerative social development, versus the neutral *techno-tropism* hegemonic in most tourism environments.

Endnotes

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[2] Quite on the contrary, in many Andalusian tourism destinations the promotion of cultural heritage is precisely the political instrument promoted to differentiate one destination from another, and to stress local or regional identity.

[3] Zygmunt Bauman updates Boorstin's classical view and coined the term 'tourist syndrome' as being characterized by 'looseness of attachment' with the place visited, the 'grazing behaviour' of the consumption of 'pure relationships', and the 'frailty of relationships' into wherever they go (Franklin, 2003).

[4] Very explicit in those cases sponsored by the World Bank, the International Monetary Fund, the World Trade Organization and the various multinational funds and financial instruments for development.

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11 Global Tourism and the Urban Poor's Right to the City: Spatial Contestation within Cairo's Historical Districts[1]

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Cairo's Historical City: Context and Urban Problems

Ahmed and Kamel (1996) divide Cairo up into three 'cities': Medieval Cairo, European Cairo and Contemporary Cairo. Their 'Islamic or Medieval Cairo (969–1863 AD)' closely approximates the Historical Cairo referred to above and, as the accompanying dates suggest, covers the area built up during the Fatimid, Ayyubid, Mamluk and Ottoman periods. They argue that urban development during these successive eras 'together led to the establishment of Islamic Cairo. … all based conceptually on Islamic urban patterns' (Ahmed and Kamel, 1996: 105). However, many elements of the original street pattern as surveyed in 1798–1800 are still evident in the present (1978) layout and morphology of Historical (Medieval) Cairo (Fig. 11.1) despite the construction of two major new streets cutting across the old urban fabric, namely *al-Azhar* Street in the north and *Mohamed Ali* Street further south which links *Sultan Hussan* mosque and 19th-century Cairo. The north-south *al-Mu'izz* Street, which links these two new streets, continues to be the main axis articulating the Historical City (Antoniou, 1998).
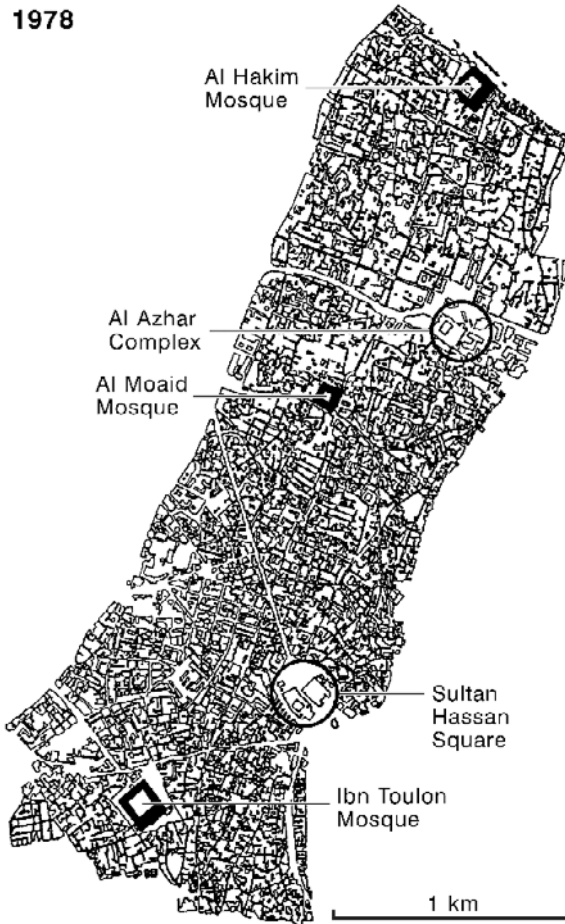
Fig. 11.1. Street pattern of Historical Cairo in 1978. Source: Sutton and Fahmi 2002a after UNDP, 1997.

The Historical City of pre-Europeanized Cairo currently retains a prominent physical urban character and a strong social identity. Several monuments dominate its townscape, notably along a north-south axis from *Bab al-Nasr* and *Bab al-Futuh* to *Ibn Tulun* Mosque, and along an east-west axis from the ancient city wall to *Port Said* Street (Figs 11.1–3). Recently constructed high rise buildings are emerging along *al-Azhar* Street (linking east-west axis which splits the main historical spine into northern and southern sections), thus changing the urban fabric and altering patterns of land use (Figs 11.4, 5). Such processes of urban development are widening the gap between different districts within the Historical City, with no evident relevance to the traditional urban fabric. Research by Madoeuf (1997) illustrates well, with a series of detailed maps, the micro-variations within *qisms* (districts) in terms of age of buildings, proportion of higher rise buildings, and especially the way population decrease started earliest in the 1950s and 1960s in the northern *qisms* of Historical Cairo and only later in the 1970s and 1980s spread to the southern districts.

Economically and socially Historical Cairo is more significant and central to the wider city's economy and society. Small workshops have recently moved into Historical Cairo and have reanimated it. Its retailing and artisan activities, even its small-scale manufacturing activities, are more lively and on a larger scale than those in the *Madinah of Tunis* (Troin, 1993). Also a lot of buildings are relatively recent in that during the late 19th century and first half of the 20th century a lot of old traditional buildings in Historical Cairo were replaced by more modern single and two storey buildings. The urban fabric was thus 'modernized' but within the long-established street pattern and the old landownership framework (Salin, 1996). This has been demonstrated for the 1990s by Aboukourah (1995) for the *al-Ghuriya* quarter where, despite the permanency of the street pattern, numerous new buildings of sometimes up to 8 or 10 storeys have been constructed. Other older buildings have been modified through the addition of further storeys, all of which serve to further overstrain the poor water supply and sewerage systems. Several *wakala* (collective multi-occupancy dwellings) remain in this quarter, albeit usually degraded. Work by Meyer (1988) suggested an improving income situation on the part of sections of the population linked to rises in the numbers of visiting foreign tourists. Thus the central bazaar area has experienced an economic revival reflected in the increase in the number of small manufacturing enterprises producing consumer and tourist goods. This economic growth has occurred despite population decline by one-third in the Historical City since the 1960s (Table 11.1).

Environmentally polluting activities such as metallurgy, marble and timber workshops and storage facilities have posed problems within the historical areas in terms of waste, noise and pollution, contributing to environmental degradation. The Historical City is generally characterized by a decaying housing stock, a lack of public spaces, and increased population densities. The deteriorating urban fabric can be partly attributed to traffic congestion together with inadequate infrastructure and insufficient service provision. Low rent laws in Egypt meant that owners often sought to sell off old multi-household buildings which new owners would let deteriorate so that they could demolish them due to lack of safety prior to redeveloping the site. This process created homeless people who then occupied as squatters the historic buildings which subsequently decayed through over-occupancy and neglect (Posmowski, 1978). There is also the problem of historical monuments being misused for inappropriate and damaging storage and commercial purposes. Thus a cycle of decay and demolition ensued. Traffic congestion particularly affects the main axis of accessibility, *al-Mu'izz* Street, and the northern gates in the city wall in the *Gamalia* district.

More significantly, the area is experiencing major changes induced by a number of large-scale projects, which would change land use from residential to commercial, and tourism-related activities (Table 11.2). Such projects range from the construction of *al-Azhar* Street underground tunnel for traffic and a pedestrian square between *al-Azhar* and *al-Hussein* Mosques, the development of new parking and commercial facilities near *al-Hussein* Hospital ('Urban Plaza') and the creation of the 30-hectare *al-Azhar* Park on the *Darassa* hills, a strategic location between the *Fatimid* city, the *Mamluk* cemeteries and the *Citadel* (Figs 11.2, 6).

Table 11.1. Historical Cairo – selected statistics.

Cairo		Historical Cairo
280 persons per hectare	Population Density (1986)	715.2 persons per hectare
9,061,320	Total Population (1986)	310,427
54,917 hectares	Area	434.03 hectares
	No. of families	70,847
	No. of housing units	83,226
4.0 persons	Average household size	4.4 persons
23.3%	Average illiteracy rate	27.52%
	Female illiteracy rate	34.04%
12%	Unemployment rate	14.56%
	Residential buildings privately owned (%)	>90%
	Owner occupied residential buildings (%)	20%
	Buildings per hectare	55 per hectare
	Buildings in residential use (%)	66%
	Buildings in commercial use (%)	34%
	New constructions between 1976 and 1986	1.2% of buildings
	19th century buildings	44% of buildings
	Ruins and vacant land	5% of buildings/plots
	Total number of shops	27,117
	Total number of workshops	207

'Historical Cairo' is defined here as the study area used for the UNDP 1997 Plan. Population housing data abstracted from the 1986 Census.
Source: Sutton and Fahmi, 2002a (after UNDP, 1997, pp. 167–173).

Table 11.2. Historical Cairo: heritage and conservation events, 1798 to 1998.

1798–1801	Napoleonic expedition occupies lower Egypt.
1800	Detailed map published of Cairo by Napoleon's surveyors.
1880	*Comite de Conservation des Monuments de l'Art Arabe* established.
1950	List of 622 'Islamic' monuments drawn up.
1952	*Comite de Conservation des Monuments de l'Art Arabe* dissolved.
1977	Association for the Urban Development of Islamic Cairo set up.
1979	Historical Cairo designated a World Heritage Site by UNESCO.
1980	UNESCO Plan for Historical Cairo produced.
1988	*Greater Cairo Region* Master Plan - Historical Cairo as part of Homogeneous Sector No. 1.
1988–1991	*GOPP/IAURIF* Plans for rehabilitation of *Sayeda Zeinab* Quarter, *Gamalia* Quarter and *Darb al Asfar* Quarter.
1992	Earthquake damaged many monuments in Historical Cairo.
1997	UNDP Rehabilitation Plan for Historical Cairo
1998–1999	*Al-Azhar* road tunnel constructed

Source: Sutton and Fahmi (2002a).

Approaches to Urban Conservation within Cairo's Historical Districts

Conservation and planning approaches have fallen into three main categories:-

1. Restoration. This approach concentrated on restoring the monuments or significant buildings, from palaces to mosques and including old traditional-style houses which exemplify vernacular architecture. Such a restoration approach theoretically could apply to all buildings in the *medina* (historical city) but in practice it tends to be localized, focusing on certain individual significant buildings while neglecting the lesser buildings between the monuments. The result can be to produce a 'museum town', for tourists rather than for residents.
2. Renovation. This approach may be necessary if buildings in the *medina* collapse and have to be cleared. But renovation has become associated with demolition and may not always result in rebuilding in traditional vernacular architectural styles. As has occurred in parts of the *Madinah of Tunis*, renovation can mean that modern buildings and architecture replace vernacular *medina* houses and styles of building.
3. Rehabilitation. This third approach seeks to rehabilitate the *medina* society and economy as it is now, or as it recently was, and does not aim to recreate the past. The focus now is on whole quarters or districts of the *medina*, not just on certain individual buildings. The built environment setting of an old mosque or other monuments is deemed to be as important as the historic monument. The *medina* is seen as the cultural built environment heritage of the city's present population whether living within or outside of the *medina* district itself. Rehabilitation can and indeed ought to involve the participation of the *medina*'s residents in decision making about their quarter and even in actively improving its buildings.

This concept of rehabilitating or safeguarding the whole *medina* district, rather than just restoring individual monuments, has only gained recognition slowly as the role that the wider urban structure plays as the supporting fabric of significant historic buildings has only recently become accepted. As Dix (1990: 394) asked, 'should historic buildings be protected in isolation like islands in the urban structure, or should the urban form endeavour in any way to emulate the city of the past?' However, rehabilitation as an approach still leaves questions about what the '*medina of tomorrow*' should be like? What should be safeguarded and for whom? How do you preserve and rehabilitate the cultural heritage represented by the *medina* without reinforcing the tourist potential of that *medina* district? Will rehabilitation merely create a kind of heritage park out of what had declined into an in-migrant reception area? Can gentrification of *medina* houses be avoided or is it indeed a desirable method of rehabilitation?

Limited efforts have been made to plan the conservation and rehabilitation of Historical Cairo following its designation by UNESCO as a World Heritage Site in 1979 (Sutton and Fahmi, 2002a). A 1980 UNESCO Plan defined six priority zones within which new development would be restricted and suggested that conservation action should be concentrated along the main north-south spinal route which links the main monuments while also acting as a focus for economic activity (Antoniou *et al.*, 1980). While this 1980 plan remained a 'paper project',

subsequent plans were in part based on it. The wider Greater Cairo Region Master Plan 1988 covered Historical Cairo (Sutton and Fahmi, 2001). In it the conservation of monuments was prioritized with an emphasis on their re-use for various social and cultural activities. Furthermore, these 1988 proposals identified the need also to upgrade the surrounding built environment of the Historical City and to raise local people's awareness of their urban heritage. The early 1990s saw three projects to rehabilitate whole districts focused on *Sayeda Zainab* Quarter, *Gamalia* Quarter and *Darb al Asfar* Quarter (Sutton and Fahmi, 2001).

The General Organisation for Physical Planning (*GOPP*) and Institut d'Amenagement Urbain et Regional d'Ile de France (*IAURIF*) French-Egyptian strategic proposals (1988–1991) aimed to enhance the urban historical fabric, through creating new public spaces in the European-style plazas and through pedestrianization and traffic control measures (GOPP/IAURIF, 1988, 1990a, 1990b, 1991). The subsequent UNDP (1997) Plan for the Rehabilitation of Historic Cairo (UNDP, 1997) also regarded pedestrianization and closure to traffic circulation as major methods of achieving improvements. Central to this would be the pedestrianization of *al-Mu'izz* Street, the 1000-year-old north-south axial spine of Historical Cairo.

Critique of Conservation and Rehabilitation Plans

In 1880 an initial effort at conserving the significant historic buildings of Historical Cairo was made with the setting up of a *Comite de Conservation des Monuments de l'Art Arabe*. As a body of enthusiasts this committee undertook the annual maintenance and rehabilitation of virtually all the medieval monuments of Cairo (Lewcock, 1989). This organization was dissolved in 1952 and its functions were taken over by the government. Consequently, 'the government is officially unaware of the meaning of area conservation and therefore has … no agency charged with this task' (Rodenbeck, 1983: 27). This was partly rectified by the creation in May 1977 of an *Association for the Urban Development of Islamic Cairo* by a group of Egyptians including the architect Hassan Fathy (Posmowski, 1978).

Back in 1950 a list of 622 monuments was drawn up (Schreur, 1999). In fact some 130 buildings on the list already did not exist but the UNESCO criterion of 600 historic buildings had to be met in order to merit 'world heritage' status. Since 1950 another 20 to 30 buildings on the original list have been demolished. As early as 1973, structural master plans for Cairo included the pre-European Historical Cairo in their remit. They stressed the need for upgrading the central historical area through its pedestrianization, the transfer of polluting activities, the continued restoration of monuments and the related amelioration of their surrounding built environment. The improvement of access to its residential quarters was also included.

The 1980 UNESCO Plan

The late 1970s saw UNESCO involvement through its promotion of an inventory of historic monuments by Michael Meinecke on the basis of which

Historical Cairo was then publicized as a significant concentration of medieval Islamic buildings (Posmowski, 1978). This was followed by the designation of Historical Cairo by UNESCO as a World Heritage Site in 1979. As a consequence, a team of architects, planners and conservators was assembled to draw up a new specific plan for Historical Cairo that aimed to reverse the flight of the Old City's residential population and to advocate emergency action for its many decaying monuments (Antoniou *et al*., 1980). The established list of 450 monuments in Historical Cairo to be protected was to be strengthened and updated. The problem of overlapping authorities was bemoaned with no overall control nor policy for the future development of the Historical City. Public authorities were weak in comparison with commercial interests. Better traffic management was advocated in particular to reduce cross traffic. Six priority zones were defined within which new development would be restricted, old buildings would be restored and new compatible functions introduced. A *Cairo Conservation Agency* should be created to act in these six zones in particular. Landownership should be rationalized and unified. To this end all land owned by the *Waqf* (religious ministry), except for mosques in current use, should be 'exchanged' for other land outside the historic area. Conservation action would be concentrated along a main north-south spinal route that would link the main monuments and act as focus for economic activity. Conservation should begin underground in view of the groundwater problem with rising water table levels which threatened the foundations of many monuments. The installation of a new drainage system was recognized as vital. The 1980 UNESCO plan also suggested that planning and conservation proposals should be launched for adjacent historic areas including the *Northern* and *Southern Cemeteries*, the *Fustat* archaeological zone, the *Coptic area* and Bulaq. Social studies were advocated to gain a fuller understanding of the situation, problems and aspirations of the existing residential population of Historical Cairo and these other historic zones. Although this 1980 plan remained a 'paper project' and was not put into action, subsequent projects tended to be based on it and there was even some continuity in the consultants involved between the 1980 project and the 1997 UNDP plan.

The earlier efforts at restoring individual monuments continued in a piecemeal and uncoordinated way. A mosque here, a *madrassa* (religious school) there, a *sabil-kuttub* (fountain) elsewhere were restored by both the Egyptian authorities and by outside foreign agencies from a wide range of countries[2]. Other countries and NGOs contributed to other such restoration efforts[3]. While worthy in their own right, these scattered piecemeal contributions, a handful of buildings out of the 500 buildings listed as important Islamic monuments, hardly added up

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[2] The Italians restored the *Mawlawi* whirling *Dervishes* theatre, the French restored some magnificent vernacular houses, the Royal Danish Academy of Fine Arts restored the *Madrasa al-Jawhariyya*, next to *al-Azhar* Mosque.

[3] An Islamic order from India restored the major, if dilapidated, al-Hakim mosque (in *Northern Gamalia*) in a somewhat controversial manner. Rodenbeck (1983: 25) was critical of the restoration of al-Hakim Mosque, which, he suggested, has 'given us instead a new building'. This was despite its restoration, or rather reconstruction, being carried out with the advice of Hassan Fathy whose 'aesthetics are charming, but have no basis in history'.

to a planned conservation of the Old City. Rodenbeck (1983: 26) argued that to save monuments in isolation from their 'environment' i.e. the urban fabric, was a sterile waste of time. There was an urgent need to recapture *Mamluk* Cairo's size, splendour and dynamism in a more holistic way.

In similar vein, Lewcock (1989: 8), in commenting on the 1980 UNESCO plan, argued that it '…was felt that it was the uniqueness of ensemble that was the real quality of Historical Cairo. Individually, the buildings are not all masterpieces, but collectively their character is strong and fascinating.' Hence, he supported the focus on six ensembles as 'conservation and rehabilitation zones'. In the event, however, the aim of conserving clusters of buildings 'to preserve their essential ambience has not been adopted.[4] An alternative approach, also put forward during the 1980s for *Gamalia* area by Abdel Fattah and Abdelhalim (1989), advocated renovation through demolition. After suggesting that 35% of the built-up area should be upgraded plus any building over 100 years old, they argued that 60 to 65% of the buildings (excluding monuments) 'must be regarded as ripe for redevelopment'. This meant ready for demolition. They further advocated greater traffic access to Historical Cairo with more parking availability and considered that a certain amount of gentrification was inevitable, as it would produce economic returns. Evidently, the future of the Old City was still under threat.

The Greater Cairo Region (GCR) Master Plan 1988

According to Kamel (1992), the development and upgrading of the Historical City (categorized in the GCR Plan as Homogeneous Sector No. 1) aimed to preserve the traditional fabric through building control regulations combined with development of public spaces in *North Gamalia* and *Darb al-Asfar* areas and provision of mixed land uses. The conservation of monuments was prioritized with their re-use for various social and cultural activities, e.g. the *Beit al Sehimi* in the *Darb al-Asfar* district (a restored 17th century house). These proposals identified the need to upgrade the surrounding built environment and to raise local people's awareness. Commercial activities were to be developed to promote the socio-economic and cultural role already played by the Historical City as a tourist attraction. Subsequently, the official policy was to transfer wholesale commercial and industrial activities to the eastern New Settlement No. 3, while keeping retailing and handicraft workshops within the main historical spine[5]. According to the GCR plan, the proposed evacuated areas within Historical City would be used to improve the road network, to introduce services such as parking areas, tourist services, open spaces and community services. The official policy aimed at improving tourism potentials as well as preserving historical heritage.

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[4] Instead, emergency action was taken on a number of individual monuments including the Citadel and the Aqueduct.

[5] This settlement (number 3) known as *Kattamya area*, has later merged with settlements 1 and 5 to create the upper middle class suburb of New Cairo City.

The General Organisation for Physical Planning (GOPP) and Institut d'Amenagement Urbain et Regional d'Ile de France (IAURIF) Plans, 1988–1991

The early 1990s saw three projects, which did endeavour to encompass whole districts. Schemes to rehabilitate *Sayeda Zeinab* Quarter in the south, *Gamalia* Quarter in the north and *Darb al-Asfar* Quarter in the east were drawn up by a joint French-Egyptian planning and research body, namely the IAURIF/GOPP. This collaborative research body produced general guidelines for the improvement of the built environment. In particular, it sought to develop the northern and southern gates and to put in place a ring road around the Historical City.

The *Sayeda Zeinab* Project included the relocation of noisy tanning and abattoir activities to less problematic sites on the periphery of Greater Cairo. What would replace these premises is rather vague according to Madoeuf (1995). The planners would try and reorientate the district towards the city centre through improved communications and then leave development to private initiative, having implanted some green spaces and public services. In its *Darb al-Asfar* Scheme the GOPP/IAURIF identified priority areas, such as *Beit El-Sehime*, a house constructed in 1648, and the house of *Mostafa Ga'afar*, built in 1713, for action plans. These areas were determined according to the significance of monuments capable of upgrading and developing and according to the predominant commercial activities and their land use patterns. Policy guidelines stressed the rehabilitation of the urban fabric, the development of public spaces, and the transfer of industrial activities out to surrounding settlements such as *Manshiet Nasser*. Then followed the redevelopment of housing and public services such as sewers and garbage disposal systems, plus the introduction of tourist facilities, including a culture centre and hotels (Edward, 1998).

In addition, 10 ha of industrial zone were to be redeveloped as part of the rehabilitation strategy which proposed the relocation of small industrial units to new settlements east of Cairo. The newly created areas within the Historical City were to be used to improve street accessibility and to introduce open spaces, parking areas and community services. The GOPP/IAURIF rehabilitation strategy proposed to enhance both the historic buildings and their urban environment through the introduction, wherever possible, of new public spaces that would serve to set off the monuments to better effect. The reuse and renovation of historic buildings would revitalize surrounding public open spaces. Somewhat in the style of European plazas, this objective would be achieved through removing various encroaching buildings and through pedestrianization and traffic control measures. Parking would be kept away from the historical monuments.

The 1997 UNDP Rehabilitation Plan

The 1997 plan covers an area of about 4 square kilometres in Historical Cairo from *Bab al-Futuh* in the north to *Ibn Tulun* Mosque in the south[6] (Figs 11.2, 3). The

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[6] The most recent plan for Historical Cairo was drawn up by a UNDP team which interestingly included Jim Antoniou, a British architect who had earlier been part of the 1980 UNESCO team.
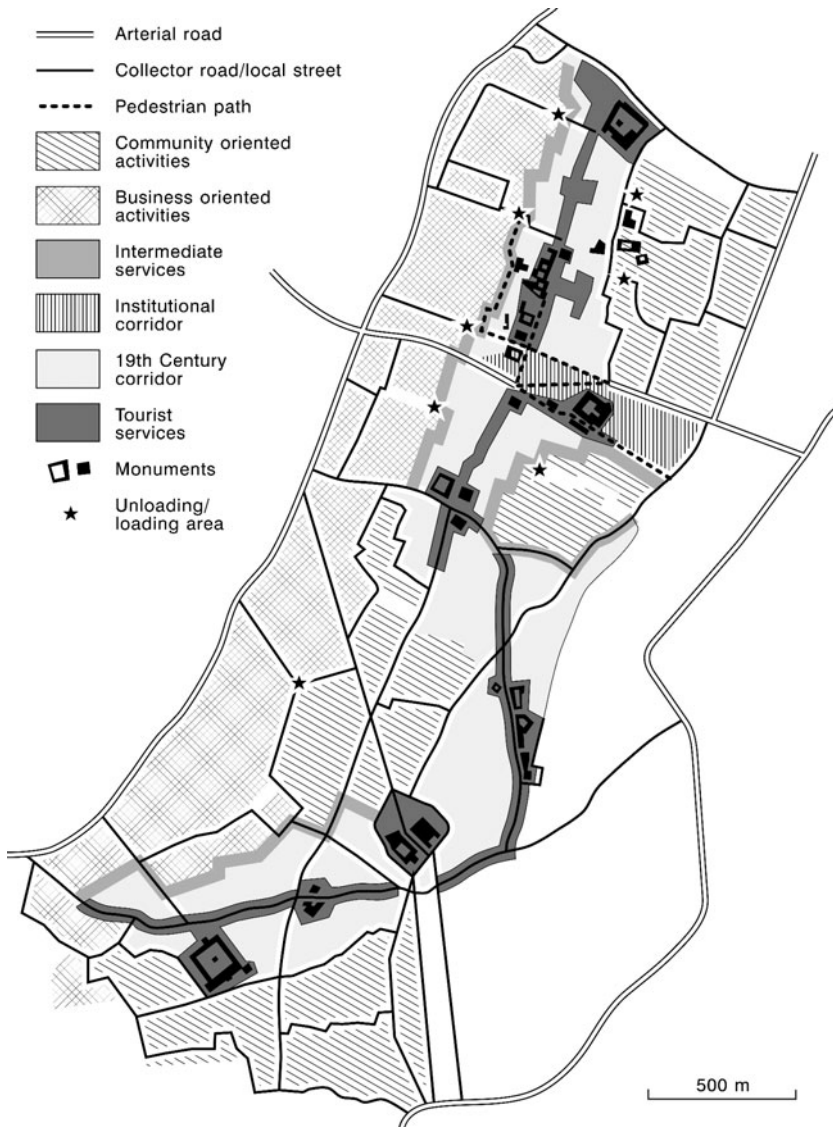
Fig. 11.2. UNDP rehabilitation plan, 1997. Source: Sutton and Fahmi (2002a).

area so delineated contained about 310,000 people in 1986, which represented a sharp drop from its 1966 population of 433,000. In seeking to achieve a broad-based rehabilitation the plan combines two contrasting approaches.

First, it advocates a tourism-based rehabilitation to restore and re-use monuments. It aims to attract in investment to restore significant buildings and then re-use them for business and even housing, so involving some limited gentrification. The squatters in such old monuments would be resettled but not in the building in question. Vacant plots would be developed for recreation
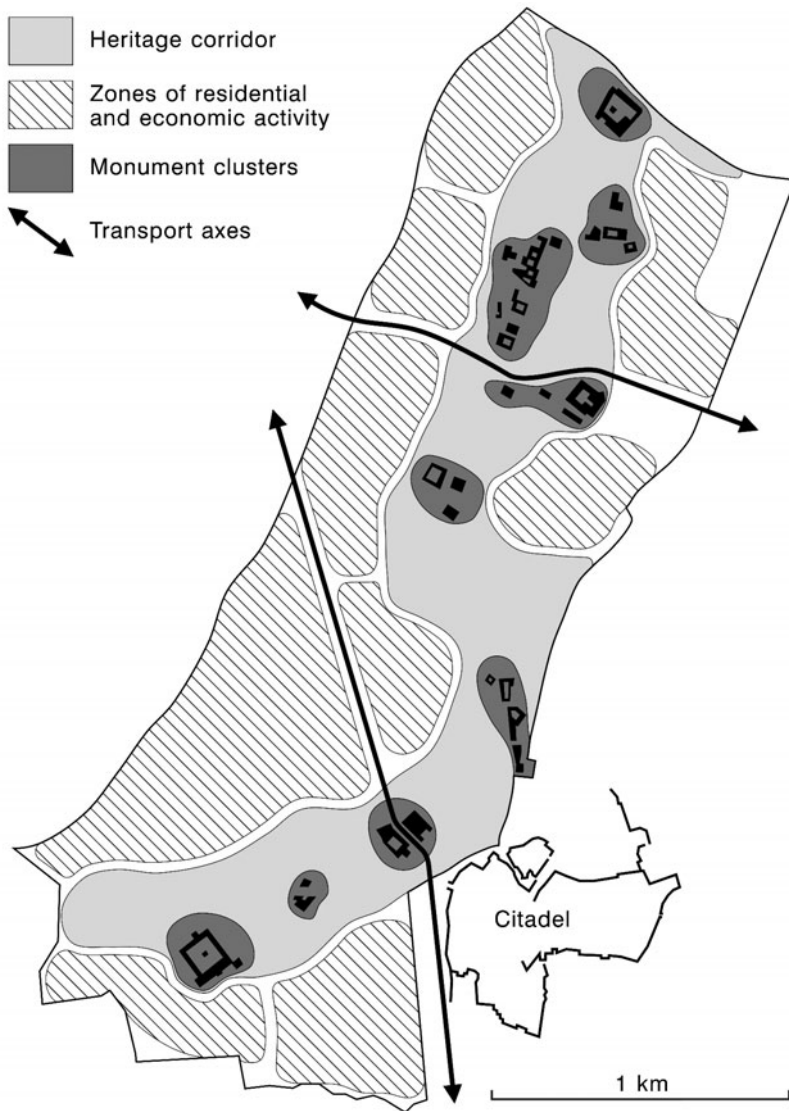
Fig. 11.3. Monument clusters and heritage corridor – UNDP plan. Source: Sutton and Fahmi (2002a).

purposes, services, and facilities for the gentrified communities. This approach would ensure the protection of monuments to a certain extent, arguing that such preservation cannot be trusted to private investment and tourism without close supervision. With the resettlement of some of the urban poor, the vibrant community atmosphere so redolent of Historical Cairo would partly be lost.

Second, the plan also advocates parallel community-based rehabilitation to benefit primarily the poorest among the present residents. This rehabilitation exercise would restore and improve local residents' housing and empower the

local community as their education and skills are improved, their built environment is upgraded, local social services are ameliorated, and monuments are restored and re-used for social services and other community functions. New projects, such as using vacant land to lodge the homeless and squatters, would be labour-intensive to provide local jobs. Cost recovery would not be ensured and few profit-generating opportunities would exist for private investors in this approach to rehabilitating the community as well as its built environment. To overcome the resource gap it is expected that cross-subsidization would occur from private capital funds to community rehabilitation. In this way a broader-based rehabilitation would attempt to achieve both rehabilitation objectives.

So, there is a degree of compromise in the UNDP plan as can be seen in Fig. 11.2. The Heritage Corridor represents the first rehabilitation approach focused on business interests and tourists. The blocks of community-orientated activities located either side of the Heritage Corridor represent the second approach. The plan uses a 'clusters approach' and identifies nine clusters of historic monuments, each being a primary target for rehabilitation, upgrading and conservation. Monument re-use would serve the community (through social services), the business sector (through licences for private sector use), and the tourist industry (through re-use as museums, information centres, etc.). The streets linking these clusters of monuments would be regarded as equally important as they provide continuity of traditional activities between the clusters. Together, the clusters and their linking streets make up the Heritage Corridor identified in Fig. 11.3. Interestingly, six of the clusters had been similarly identified in the 1980 UNESCO study, exemplifying continuity between plans.

Other pertinent aspects of the 1997 plan include the pedestrianization of the central spine, along *al-Mu'izz* Street, and some other streets, at least between 9.00 a.m. and 9.00 p.m. Also one-way streets would be introduced to ease traffic congestion. Several loading/unloading areas are planned linked to the outside road system. A vacant-land tax would seek to encourage development on hitherto unused and abandoned plots. A key contribution could be the advocated 'adaptive reuse' (UNDP, 1997: 85) of restored buildings with the suggestion that a significant *sabil-kuttub* (former fountains and *koranic* schools combined) be used as a tourist information centre. Interestingly, the plan also aims to resurrect the old '*al-fina*' (outside courtyard) concept, whereby shops and workshops can extend their activities out on to the street in front of their premises. Therefore, streets in Historical Cairo would again consist of central public space for pedestrians and traffic and semi-private space that can be used by local residents for trading and other uses. *Mastabas* or stone benches, which had been curtailed in 1834 as apparently obstructing the passage of wheeled vehicles, could be restored outside houses (Rodenbeck, 1983: 23). As in earlier plans, several demonstration projects are advocated, e.g. around *al-Azhar* Mosque, *al-Darb al Ahmar* area in the centre-east of Historical Cairo and *Gamalia* quarter in the north-east part. This latter demonstration area contains several important Islamic monuments from the *Fatimid* to the *Ottoman* era together with a variety of socio-economic activities and a residential population which is still among the poorest in Cairo.

While this UNDP plan was originally produced in 1997, it has yet to be comprehensively put into action. Indeed, the UNDP consultancy team anticipated a lack of action, probably in the light of earlier experience with Egyptian Government authorities. The team considered that the current (1997) situation

was acute enough to necessitate immediate action on a large enough scale to save the fabric of Historic Cairo and its many monuments. The alternative to taking such action would be to relinquish the historic core to vested interests and only to concentrate on saving a few individual monuments. The UNDP report considered that 'such an outcome would be a major loss for Egypt and the whole world' (UNDP, 1997: viii). A related problem is the establishment of an appropriate authority, like the *Association for the Safeguard of the Madinah in Tunis*, focused on Historical Cairo and managing its heritage conservation. The UNDP report (1997: 151) does suggest a very hierarchical organization, dependent on the Egyptian Government ministries and hardly involving local people at all, whereas a bottom-up NGO would probably be preferable. Political considerations, however, would undoubtedly exclude the latter approach to management. So Historical Cairo now has a promising plan based largely on the principles of rehabilitation rather than just restoration. But action on Historical Cairo's safeguarding remains limited to the piecemeal restoration of a limited number of its monuments and to a few demonstration projects (Sutton and Fahmi, 2002a).

Late 1990s Planning Activities in Historical Cairo: *Al-Azhar* Tunnel and *North Gamalia* Axis

Despite the availability of an overall 1997 Rehabilitation Plan, the government has pursued its own separate conservation policies between 1998 and 1999. Given its tourist potential *al-Azhar* square was considered a priority area by government officials, since *al-Azhar* bridge presents visual problems with associated traffic having environmental consequences on historical monuments within *al-Mu'izz* Street main spine and *Khan al-Khalili* bazaar area (Figs 11.4, 5). So resources have been invested in what amounts to one of the most significant projects so far to upgrade Historical Cairo.

After two years devoted to the restoration of *al-Azhar* and *al-Hussein* mosques, an underground tunnel was constructed under *al-Azhar* Street. As a result, the area between the two mosques will be pedestrianized and transformed into a new plaza, which would directly have access to the central spine of *al-Mu'izz* Street and *Khan al-Khalili* bazaar area. Traffic would be diverted largely on to an inner ring road around the Old City which initially included the creation of *North Gamalia* axis outside the northern city walls as an alternative to proposed pedestrianization of *al-Azhar* Street. The *North Gamalia* axis has resulted in the partial removal of *Bab al-Nasr* cemeteries (as will be discussed later in the chapter).

Analysis of Historical Cairo's Rehabilitation Programmes and Population Eviction

Al-Azhar pedestrianization scheme and *North Gamalia* proposals

In order to assess the impact of the above proposed and now partly implemented developments, the author administered a field study which employed ethnographic techniques for generating empirical observation. Unstructured interviews were held
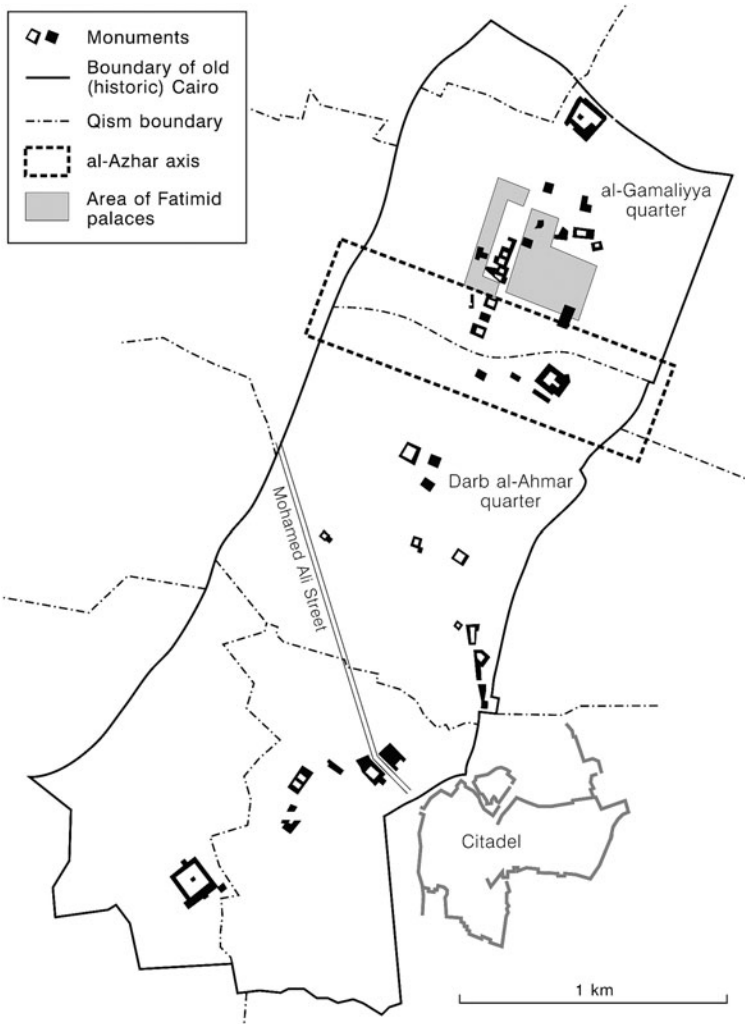
Fig. 11.4. Location of *al-Azhar* axis in Historical Cairo. Source: Sutton and Fahmi (2003).

with secondary stakeholders including key agencies (planners, local authorities) involved in the HCRP (Historic Cairo Restoration Programme – *al- Azhar Scheme* and *North Gamalia Project*)[7], and with the director of local NGO (Association for the Urban Development of Islamic Cairo-AUDIC). These interviews looked at aspects of management of built environment and quality of life of local inhabitants, within the context of cultural identity.

More importantly, a small area survey employed direct observation, and structured interviews with randomly sampled primary stakeholders within the two areas:
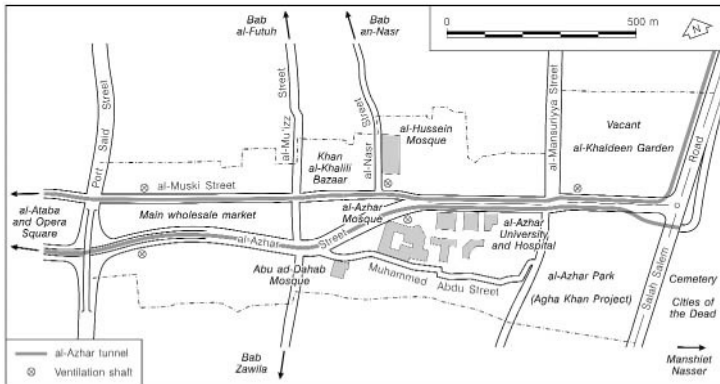
Fig. 11.5. *al-Azhar* axis – main streets, buildings and localities. Source: Sutton and Fahmi (2003).

1. The area between *al-Hussein*/*al-Azhar* Mosques (*Khan al-Khalili Bazaar* and *al-Mosky* wholesale market (Sutton and Fahmi, 2002a; Fahmi and Sutton, 2003)
- 50 local residents (heads of households)
- 10 wholesale merchants (*al-Mosky* Street and Wholesale Market)
- 20 retail shop owners (*Khan al-Khalili Bazaar* between *al-Mu'izz* and *al-Nasr* Streets)
- A number of stallholders (wholesale market and *Bazaar* areas)

2. *North Gamalia* area (Sutton and Fahmi, 2002b)
- 40 tomb dwellers of *Bab al-Nasr* Cemetery area.

Pedestrianization of *al-Azhar* Street and reorganization of *al-Mu'izz* Street and *Bazaar* area

Planners expressed the need to generate awareness and support among primary stakeholders, particularly community leaders, of the benefits of the pedestrianization project of *al-Azhar* Street, as the project represents a tourist, commercial, cultural and recreational axis which will provide inhabitants of the area, visitors and traders, with sustainable services and will become an attractive cultural focus. Local authorities emphasized that the project location is of great value with socio-economic potentials of attracting both national and international tourists to the area. The project will be concerned with landscape and architectural characteristics of the area (decorations of facades, tiling of plazas and promenades, types of trees, etc.), reusing existing buildings, constructing a multi-purpose commercial and cultural *wekala*, while providing tourist services (agencies, banks, restaurants, coffee shops, bazaars, etc.) within vacant lands.

Three axes are proposed: First, a tourist axis functions as an entrance to the area from the east (coming from *Salah Salem* and *al-Mansuriyyah* Streets) with a concentration of bazaars, three-star hotels, restaurants and coffee shops, etc. Second, a commercial axis provides the western entrance to the area (coming from *Port Said* (al-Khalig) and 'Ataba Streets) and is characterized by a tourist market, and shops or light-structure stalls to house street peddlers who presently occupy

al-Mosky Street. Al-Azhar axis with commercial shops will display goods stored elsewhere in *Bab al-Nasr Northern Cemetery* area and in *Port Said* Street. Third, a cultural axis is proposed between the western fence of *al-Azhar* University and the eastern facade of *al-Azhar* Mosque, starting from *al-Azhar* Square to *Muhammad 'Abdu* Street. This spine will house a second-hand books market, linking with the cultural centre within the restored houses of *Zaynab Khatoon*, *al-Harrawy* and *al-Sitt Wassila*. Whilst the plan aims at pedestrianization of *al-Azhar* Street, a network of secondary streets will be used for accessing services to the area, with parking areas for local inhabitants and shop owners, within proposed multi-storey garages (at the intersections of *al-Azhar* and *al-Mansuriyyah* and *al-Azhar* and *Port Said* Streets). This part of the plan allocates specific locations for loading and unloading vans serving wholesale markets in the area.

While the potential benefits of involving NGOs are recognized by some stakeholders, the existing coordination structure did not involve NGOs except on a limited scale. A critical view was expressed by Hassan (2002) of the *Association for the Urban Development of Islamic Cairo* (AUDIC) who emphasized *al-Azhar* area's significance as the outlet for traditional materials and products which are not available in modern department stores. These include peasant shawls, traditional leather money belts and white shawls for hajis (pilgrims), textiles with traditional patterns, gold and silver jewellery, as well as perfume essences, spices and household goods. Closing *al-Azhar* area to car traffic will result in the decline of such traditional markets and crafts. Hassan (2002) emphasized that, while *al-Azhar* area has only four historic monuments, albeit important ones, it is arguably the least appealing street within the Medieval Cairo area (Fig. 11.5). This is attributed to the construction of a new stock of reinforced concrete buildings, which are hardly an attraction to tourists, the raison-d'etre of this project. More significant are Hassan's claims that the proposed intervention will devastate and disperse the community, since the historic city has been the main commercial and industrial centre of Cairo since the end of the 19th century and remains the main commercial focus. Thousands of families' livelihoods will be affected by the decision to turn *al-Azhar* Street into a pedestrian street. Wholesale and retail shops will lose their clients if they have to reach their destination on foot from *al-Azhar* Street, *Port Said* Street, in the west, and *Salah Salem* Road.

Hassan proposed access of goods to *al-Mosky* Street and adjacent commercial areas could take place between 10:00 p.m. and 10:00 a.m. Light transport systems, including electric cars and animal carts, would be permitted for transporting small goods in bulk. Such traffic could be permitted up to the wholesale area by *Bab Zuweila Gate* in the southern section of the Historic City. However, the electric cars, resembling golf buggies, which have been proposed by officials to carry people and goods, are considered too expensive. They might be affordable to tourists but not suitable for transporting the bulky packages or household appliances purchased by local population.

Bazaar peoples' reactions

In focus group meetings, primary stakeholders were able to express their future expectations and attitudes, which contributed to their satisfaction with *al-Azhar* pedestrianization scheme. The extent of respondents' satisfaction with, and

attitudes towards, the project were derived subjectively, with their expectations ranging between what the area was like a few years ago and the vision of what the area could be in the future. Interviews and discussions considered the 'influence' primary stakeholders have on project procedures and the 'importance' actually given by the scheme to satisfying each stakeholder's needs and interests. Stakeholders' attitudes and evaluation of the project are dependent on such factors as socio-economic characteristics, political and cultural affiliation, institutional capacity, and future expectations from their built environment.

Households' attitudes

Local residents' dissatisfaction with the proposed programme was mainly attributed to their lack of involvement with no consultation about the construction of *al-Azhar* underground tunnel. Most respondents (80%) ($n = 40$) mentioned that one direct effect of *al-Azhar* pedestrianization project was the disruption of economic structure, social ties and community networks. Respondents were concerned about the immediate socio-economic effect of the construction of the tunnel, and the subsequent pedestrianization of *al-Azhar* Street on vehicular access to storage areas within the commercial and industrial zones (*al-Mosky* and *Gamalia* areas) within the historical axis (*al-Mu'izz* Street). They expressed the need for accessibility of vehicles through the main service road and secondary streets, and for pedestrians' entry to public spaces and squares.

Official plans to relocate commercial and industrially polluting activities caused anxiety among workshop owners, concerning the future. Despite problems of noise and pollution caused by workshops and small-scale industries, people were discontent with alternative sites (eastern New Settlement-Kattamya) which would disrupt this pattern of socio-economic transaction as well as their prospective markets (already established within the Historical City). The study survey revealed that there was a considerable number of low income people, residing alongside the main historical axis, who were threatened with being forcibly moved out of their houses as a result of *al-Azhar* land clearance plan. Resistance to the planned eviction scheme was expressed by two-thirds of the interviewed local residents, with women and elderly members of the community (59 years and above) expressing more anxiety about their relocation, as compared to younger age groups (between 15 and 39), in relation to un-affordability to find an immediate alternative residence. Other respondents pinpointed security of tenure as a problem, as they often had no official documents to prove their ownership of buildings, thus facing possible eviction with minimal compensation. Nevertheless, the issue of compensation was raised in terms of who would be eligible, with questions being posed of whether there would be enough replacement housing, where it would be located and would it be accessible to employment and to services such as education and health centres. As a result, nearly 20% of the sampled householders ($n = 10$) started squatting in unused (abandoned) historical monuments in *Northern Gamalia*, with 30% ($n = 15$) already occupying evacuated informal housing units, which were less affected by the 1992 earthquake. Other long-term and low income residents have constructed un-authorized buildings adjacent to certain monuments in order to accommodate their increasing household size, thus restricting traffic circulation and reducing public open space.

Despite scepticism expressed by 40% of their respondents (*n* = 20) about the government's ability to deliver appropriate services, improvements within the urban environment were invariably regarded as being the municipality's responsibility. Female respondents mentioned aspirations for educational, medical, and recreational facilities, which ought to include secondary schools, libraries, clinics, and cinemas. Further needs expressed were for the development of open spaces including children's playgrounds. Environmental services such as water supply were considered inadequate in some areas, with many utilities and services being urgently needed. The lack of such services and infrastructure greatly contributed to the expressions of dissatisfaction by most respondents, who emphasised the need to introduce a proper garbage disposal and refuse collection system, as well as an adequate sewage system. There was no preference for large scale projects, as respondents opted for mixed and diverse land uses including multi-functional buildings, both residential and commercial, in order to provide vital street socio-economic and cultural life. Expectations that landscaped open spaces, paved main streets and reduction of noise pollution would improve as part of recent urban development projects were often not met, probably because such schemes were aimed at tourists rather than local residents.

Local narratives

Local narratives and peoples' stories recorded during interviews have revealed the impact of *al-Azhar* regeneration project on households' lives. These include shop owners' views about recent changes occurring in the *Bazaar of Khan al-Khalili*, and low income people's anticipations regarding their proposed relocation to eastern New Settlement No. 3 (Kattamya) (after being forced to move out of *Gamalia* to clear space for urban regeneration around historical monuments).

'Those who had little money rented a place in *Manshiet Nasser* or somewhere else nearby. They said that at least they were close to their source of livelihood in the bazaar and *Gamalia*. If we had some money, maybe we would also move somewhere close to our work place. The Officials will do nothing for us.'

'When we were living in *Manshiet Nasser* before, there was no privacy. It was unsafe so we preferred to move to vacant buildings in *Gamalia*, but now we were told to move out for area re-development.'

'Life in the *Bazaar of Khan al-Khalili* has changed drastically in recent years. Only twenty years ago, the Khan's crowded streets and alleys were still medieval with the merchants and craftsmen all living in the market, in the warren of small houses branching off the busy shopping areas.'

'Recently the Historical City has experienced a decline in its population who moved to other parts of the City, with many goods being manufactured outside the market. This situation will further aggravate once the *al-Azhar* Street is pedestrianized.'

'Previously I could just move from my flat upstairs to the shop downstairs, in five minutes. Now I travel by bus for nearly an hour to the shop, and my wife cannot easily make the journey. My children are all in schools located far from *Khan al-Khalili*, so life is no longer based on close family networks it once was.'

'We used to work in front of the shop. It was good for business because the customers could see how much work it took to make our goods.'

(respondents' narratives in Fahmi and Sutton, 2003)

However, primary stakeholders demonstrated that their attitudes towards the project were based on more visible activities such as school health and rubbish disposal. Contribution of primary stakeholders in the evaluation of the project was mainly related to their awareness of the project's real objectives Vagueness and uncertainty prevailing within the detailed proposal scheme resulted in primary stakeholders' low involvement in the project planning procedures and therefore limited their participation in evaluation. Such evaluation is seen as monitoring and critically analysing official intentions. In the case of *al-Azhar* project, widely perceived by primary stakeholders as having adverse consequences, people found it difficult to understand why there should be an evaluation. During the survey local authorities asked why respondents were asked the same questions: 'Do you not believe us?', 'The programme is successful' and 'We know we are making progress' were common responses in both interviews and focus group discussions. Even though there is limited recognition of the need for evaluation, it is evident that the capacity of both primary stakeholders and institutions to carry out evaluation needs to be enhanced. Even at the management level, there are statements such as 'I never thought of that before I was asked by you – your questions got me thinking'.

Attitudes of wholesale merchants and retail shop owners
The political influence of community leaders and strong social relations were instrumental in developing awareness of the project objectives, particularly among those merchants within *al-Mosky* wholesale market and the *Bazaar*. Traders and merchants seemed well aware of what the authorities have been proposing. They were initially interested in the project and its potential for creating urban development activities, as they appreciated the government's tentative approach in seeking to test local opinion in advance of definitive action. When they realized that this was not going to happen, many of the *Bazaar* shop owners opposed the pedestrianization plan.

Consequently, merchants have suggested a 6-month-long trial to ascertain the possible damage to the local economy as a result of the closure of *al-Azhar* Street to vehicle traffic and the introduction of electric cars for shoppers. They were also concerned by the possible adverse pollution from fumes emanating from the tunnel's ventilation ducts. Further, they expressed worries that *al-Azhar* Mosque and its environs would become just a tourist area, losing much of its local Cairene clientele. Interviewees among the traders suggested closing *al-Azhar* Street just for two or three days a week, so as to preserve the area's commercial role. Indeed, they would prefer the flyover to be left in place and are against complete pedestrianization. There were also worries that the removal of the flyover supports might affect the foundations of adjacent buildings, often the traders' premises.

Stallholders
The situation was more stressful for those who have set up informal enterprises in the area, such as temporary stalls, as they feared losing their livelihood. This was attributed both to harassment from wholesale merchants and small shop

owners in *al-Mosky* area, and to the local authority's reluctance to regularize the location of their enterprises. Such a regularization process involves a complex procedure full of bureaucratic delays and quite considerable expenses. Nevertheless, the local NGO *Association for the Urban Development of Islamic Cairo* (AUDIC) has helped people obtain a stay order from the courts to halt the demolition of their original stalls within the area, while providing legal advice to those who are evicted. But this was not followed by a sustained campaign in support of their case, and in the absence of a strong local people's organization, stallholders and hawkers will be evicted.

New activities expected to be introduced to al-Azhar area

The current study indicated that the proposed *al-Azhar* regeneration project has ignored UNDP's (1997) and GOPP/IAURIF's early 1990s recommendations with respect to the identification of nine priority areas or clusters for protecting Medieval Cairo's immense architectural heritage, mainly along *al-Mu'izz* Street. The street, which is at right angles to *al-Azhar* Street, has nearly 21 significant monuments. Whilst both streets could be pedestrianized, there is a need to allow people to access their residences and workplaces, and shoppers, retailers and families to continue to make purchases as before. Also, merchants should continue to deliver their goods close to the entrance of *al-Mu'izz* Street, which can then be transferred using hand carts and other non-mechanical vehicles. Similarly, there would be an equal possibility for local transport from *Salah Salem* Road in the east, bringing residents who live and work in the area together with students, shoppers, and visitors to religious shrines at *al-Azhar area*. There seems to be no reason to construct gardens and/or tourist buildings along the whole length of *al-Azhar* Street. Rather, it ought to retain much of its present function of serving its local community.

More importantly, there should be more emphasis on both the *al-Mu'izz* north-south historical and commercial spines, and on *Gamalia* commercial Street, linking the northern gates of *Bab al-Nasr* and *Bab al-Futuh* to the southern gate of *Bab Zuweila*. Both spines pass through *Khan al-Khalili bazaar* area together with *al-Hussein/al-Azhar* Square (Grand Plaza), with both intersecting the east-west semi-pedestrianized *al-Azhar* Street. It could be anticipated that a degree of gentrification might occur along this east-west axis, as suggested in Fig. 11.6 and Table 11.3.

The review of attitudes of various stakeholders has shown that there are strong arguments against the proposed pedestrianization of the full length of *al-Azhar* Street. Whilst the official plan would strengthen an east-west development along *al-Azhar* axis, this will weaken the traditional north-south axis. However, much of *al-Azhar* Street could remain a road for vehicles, strictly for access in and out of this central part of Historical Cairo, but not as a through route. That latter function has been taken over by the tunnel and, in time, by the proposed third metro line. Only the central section of *al-Azhar* Street ought to be pedestrianized. This would incorporate the junction with *al-Mu'izz* Street, itself to be pedestrianized, and the open spaces between *al-Azhar* Mosque and

Existing

Legend:
- Urban park (al-Khaldeen Garden - vacant land)
- al-Azhar Park (Agha Khan Project)
- Wholesale market (al-Muski)
- Residential
- Mixed residential – historical/cultural area
- Mixed residential – commercial (specialized and workshops)
- University campus (Medical School) and Hospital
- Main historical area (al-Hussein – al-Azhar – Abu ad-Dahab Mosques)
- Commercial – historical bazaar (Khan al-Khalili)

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Proposed

Legend:
- Open space and green belt
- Residential
- Mixed residential – commercial
- Core service centres
- Specialized wholesale commercial
- Handicraft/activities
- Cultural centre/ educational services
- Tourist investment area (Qasabah)
- *i* Main Plaza and tourist information service
- ✶ Main historical monuments
- ○ Vehicular access and U-turns
- ▮▶ Access to area
- Main vehicular streets
- Main pedestrian paths

Fig. 11.6. Actual and potential land use along *al-Azhar* axis. Source: Fahmi and Sutton (2003).

Table 11.3. New activities expected to be introduced to *al-Azhar* area according to official plans.

Northern side of *al-Azhar* Street

A: Business centre and new office-administrative developments;
B: Newly refurbished housing stock (and perhaps some newly-built structures) for upwardly mobile urban professionals;
C: Tourists' open museum with a commercial centre for marketing handicrafts;
D: Investment centre and specialized commercial centre;
E: Potential commercial district with both traditional wholesale and newly introduced activities.

Southern side of *al-Azhar* Street

G: Business centre and new office-administrative development;
H: Cultural hub;
I: Main historical core and tourists' activities – plaza and open museum;
K: Potential mixed use and new investment development area;
L: Main commercial district with mixed residential functions (gentrified at the expense of traditional wholesale markets);
M: Business-orientated service area.

Source: Fahmi and Sutton (2003).

> *al-Hussain* Mosque, together with the narrow streets around *al-Azhar* Mosque and *Khan al-Kalili bazaar* area[8].
>
> In the event the authorities will probably take a more hesitant approach. They will put forward plans for closing *al-Azhar* Street, partially or completely, in order to test public opinion and then, perhaps, retreat if stakeholder groups are against the changes. One problematic issue may well involve land values and land speculation. What will be the effect of these pedestrianization proposals on local property prices? Will such economic issues prevail in a location where aesthetic and cultural values ought to be pre-eminent?

North Gamalia scheme and eviction of *Bab al-Nasr* cemeteries

> *North Gamalia* comprises a dense historical heritage with high population densities and increasingly derelict and decaying urban area with environmentally damaging metallurgical industries (Fig. 11.2). The GOPP/IAURIF 1990 proposal

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[8] There would be a need for vehicle turning areas at the interface between the pedestrianized zone and the two access roads from east and west along the line of the present *al-Azhar* street. These access roads should be strictly controlled through the use of speed limits using safety bumps and parking restrictions limiting parking in terms of time and of local residents and businesses only. The present footbridge over *al-Azhar* Street, an acknowledged eyesore, could be removed and severe restrictions imposed to deter street vendors and informal stalls occupying the new pedestrianized zone.

plan recommended the creation of a new boulevard along the northern city walls in order to facilitate access to the Historical City together with the development of open spaces. According to Madoeuf (1995), North *Gamalia* project aimed to rehabilitate 60ha, half of which constituted the old cemetery of *Bab al-Nasr* just north of the Fatimid Walls which themselves were to be restored and freed of their accompaniment of lean-to shanties (Edward, 1998). The cemetery, partly occupied by squatters, was to be transformed into a park, but keeping some significant tombs such as that of *lbn Khaldoun*. Real estate opportunities were to be provided within 25ha of *Bab al-Nasr* Northern cemetery. In addition, 10ha of industrial zone were to be developed as part of the rehabilitation strategy plan. More controversially was a proposed development containing two luxury tourist hotels and a commercial centre in the form of a new market (souk), modelled on the *Khan-al-Khalili bazaar* area, to the north of *Bab al Futuh*. In general terms the North *Gamalia* project sought to emphasize the creation of public spaces surrounding the monuments.

Elodie Salin (1996: 83–86) is quite critical of the over-orientation towards international tourism on the part of the North *Gamalia* project. She argues that the social improvement aspirations of the IAURIF's French urbanists have been somewhat forgotten in the tourism-dominated GOPP plan. A four-star tourist complex has little relevance in a zone of low class housing. An urban museum situation is threatened with a segregated space orientated more to tourists than to the original inhabitants. According to Madoeuf (1995), many of the residents would indeed be resettled in the eastern New Settlement No. 3 on the fringe of Greater Cairo (*Kattamiya*), with 500 dwellings and 280 businesses disappearing to be replaced by 1000 apartments and 10,500 square metres of shopping space.

Tomb dwellers' attitudes

According to Sutton and Fahmi (2002b), plans for clearing *Bab al-Nasr* Cemetery were already under way as part of the north *Gamaliya* project despite disputes over compensation to cover the evacuation and demolition of the tombs (Fig. 11.7). The significance of this cemetery is mainly attributed to the fact that it houses the graves of *Badr EI-Gamaly* (the founder of the Gamalia quarter), *El-Maqrizy* (the great historian) and *Ibn Khaldoun* (the pioneer social reformer) (Nedoroscik, 1997). Additionally, the cemetery is famous for its unique architecture of wooden tombs, varying between one and two floors, with balconies and loggias ornamented by lace-like woodwork and timber domes, adopting Ottoman styles with Roman and Coptic architectural details. In 1984, a decision was announced to demolish this cemetery and replace it with a large public garden. This decision was followed up by a partial demolition in 1989 that has resulted in the destruction of some important graves.

Protests by professionals and historians led to the formation of a committee that arranged a documentary exhibition on the origins and development of this cemetery, proposing the transformation of the cemetery into a public garden, while preserving the significant tombs within the natural topography, and emphasizing the various architectural forms. Disappointingly, the *Supreme Council of Antiquities* did not support this project and the area has recently been
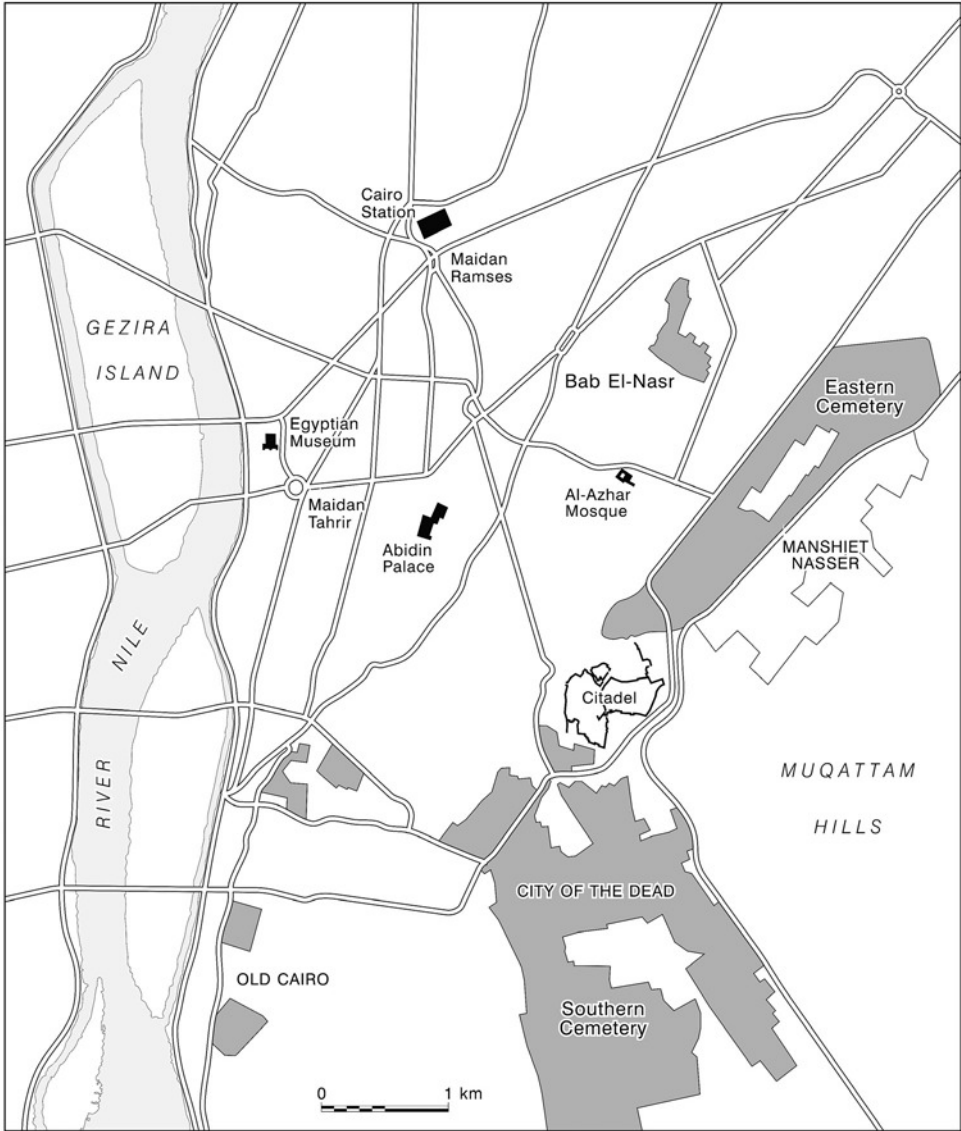
Fig. 11.7. Location of *Bab al-Nasr* Cemetery in relation to *al-Azhar* axis and Historical Cairo. Source: Sutton and Fahmi (2002b)

bulldozed and paved over with streets and parking areas. Consequently, the people residing in this cemetery were to be relocated to eastern new communities (Kattamya) outside Cairo's urban fringe and the tombs replaced by upper and middle class houses, public parks, and a new luxury hotel development. Despite NGOs attempts to assist people obtain a stay based on judicial order to stop the demolition of their homes within the cemeteries, a considerble number of tomb dwellers were evicted.

Following an official removal of part of *Bab al-Nasr* Cemetery in order to widen *Salah Salem* Street and create the North *Gamalia* axis, the current study administered a small area survey of 40 households, (40% of relocated households). The survey employed direct observation and open-ended interviews with affected relocatees and heads of households, as well as interviews with officials concerned with demolition procedure and resettlement programme (Sutton and Fahmi, 2002b). The study survey revealed that there was a considerable number of people residing in tombs, with an approximate 500 people (nearly 100 households) being forcibly moved out of the cemetery's wooden tombs as result of land clearance procedures. Resistance to the eviction scheme was noted among 75% of the sampled households ($n = 30$ households), with women and elderly members of the community aged 50 years and above expressing more anxiety in relation to their inability to find an alternative shelter, as compared to age groups between 20 and 39 years, in relation to their inability to find an alternative shelter. Whilst 25% of the sampled households ($n = 10$) were relocated to new eastern settlements, 15% ($n = 6$) of the evicted households squatted into unused historical monuments in *Gamalia* close to the northern gates of the Historical City, occupying evacuated informal housing units which were not affected by the 1992 earthquake. Nearly one-third ($n = 12$) of the respondents, with rural background and affiliation with relatives living in surrounding settlements, moved east to the spontaneous urban district of *Manshiet Nasser*. Householders who worked as tomb guards (*ghafeer*) or gate keepers (*torabi*) (30% of sampled households, $n = 12$) resorted to more conventional squatter huts, and tents in vacant land pockets between tombs in the Eastern Cemetery (Fig. 11.7). As a result, a shantytown started developing on the vacant land close to *Salah Salem* Street and the *autostrada*. Such encroachment would affect the proposed immediate intervention plan to develop newly created open areas within the Eastern Cemetery, (while upgrading *Manshiet Nasser* settlement, and enhancing its visual connection with the Historical City core).

Most respondents (80%) ($n = 32$) mentioned that one direct effect of tomb dwellers' eviction and removal of *Bab al-Nasr* Cemetery was the disruption of economic structure (especially among guardians of tombs), social ties and community networks which nevertheless characterized Cairo's urban poor within other low income and deprived areas. Residents' reactions ranged from scepticism about the government's ability to provide them with appropriate alternative housing (30%, $n = 12$) to those extremely poor tomb dwellers that welcomed any official proposals (25%, $n = 10$). Other respondents were content with their lives in the cemeteries (45%, $n = 18$) regarding the area now as their home. However, the issue of compensation was raised in terms of who would be eligible. Questions were posed of whether there would be enough replacement housing, where it would be located and would it be accessible to employment and to services such as education and health centres? How should economic gains be weighed against the valid concerns of tomb owners and residents over compensation and new cemetery locations?

Local narratives in the eastern New Settlement No. 3 (Kattamya)
The study survey illustrated case histories of various heads of households who described their lives after eviction from *Bab al-Nasr* Cemetery to the eastern desert settlements, as 'Out here, there is nothing . . . ' where some of them moved twice, choosing to live initially in temporary tin huts or tents on vacant land within fringes of the Eastern Cemetery, and then forced again to resettle within Cairo's eastern desert communities (Fig. 11.8);
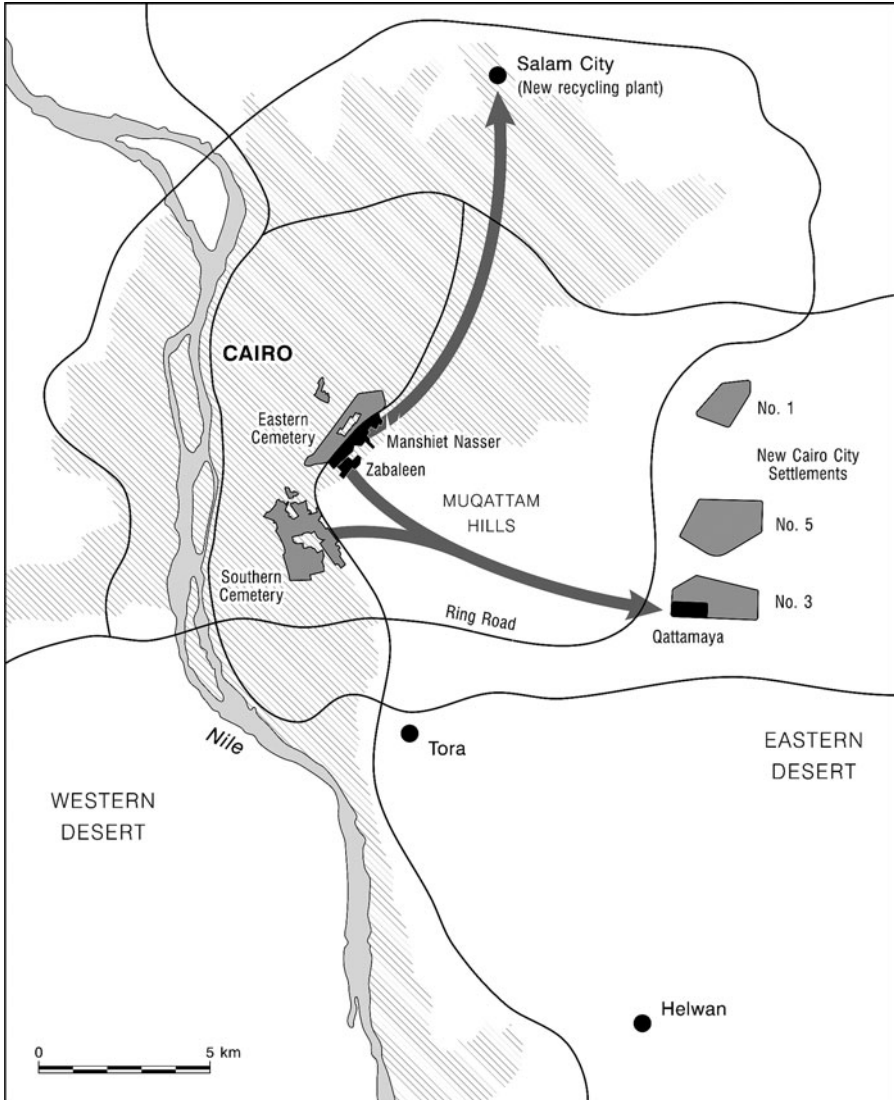
Fig. 11.8. Population eviction from cemetery areas to Cairo's eastern New Settlement No. 3 (*Kattamya*). Source: Fahmi and Sutton (2006).

'Look what we have got… nothing. There is no water, no electricity…Nobody is going to help us. I worry about how I am going to feed my six children.'

'The local officials for our area told us we had to get out. We asked where we could possibly go, and were told not to worry, as we would be provided with alternative plots. Some of the men did not agree to this, as there was nothing in this new place. And then, what about our livelihood? The local officials told us that in a week's time all facilities would be given to us. We were sceptical but what could we do? We are poor people; we have no money, no power. We had no options.'

'The local authorities arrived with the police and a lot of other people and told us to pack our things, saying that they were going to shift us to Cairo's New Eastern Desert Communities. What would happen to our children? How will we feed them? What about our homes?'

'We couldn't do anything, so we packed up our few belongings, tried to salvage what we could from our homes. . . . . We had managed to save some money to introduce modifications to the tombs with such great difficulty and they were now going to be destroyed.'

'We have been given plots (areas = 60–100 square metres) in the new desert settlements. . . . How can we build our homes there? . . . The plots cost approximately LE 5000 (1US$ = LE 6) which we have to pay in only two instalments. We can't afford LE 2500. How can we save? Who will give us a loan?'

'The local authorities said that within a week (after arriving at Kattamya) we would be given all facilities. We don't have any latrines. All we have got is a water tap. There are about 300 families here. Some of us don't get any water, so we have to share.'

'In *Bab al-Nasr* Cemetery at least we were in the centre of the city, we could get jobs. The men could earn some money to feed their families. Out here there is nothing. Some of us had shops, or a tea cabin, while most of the women like me worked in different areas nearby doing housework. We earned about (LE 125–150). Now, this place is so far from the city that we have to spend LE 5 a day on transportation.'

'Most men were involved in burial activities within the tombs, earning a daily wage. Some worked as hawkers. Who will buy their stuff? The main road is so far away. We also need money to buy something to sell. Who has the money?'

'Now women have to work. We spend at least 2h going and coming to work. If I don't work, our families will starve. Everything is so expensive . . . Only the poorest came out here. Nobody cares for us and nobody will do anything for us. We will just have to slowly rebuild our homes all over again.'

(Sutton and Fahmi, 2002b).

Urban poor's (tomb dwellers') right to the city

Community leaders emphasized four main failings (no warning, no consultation, no compensation and no provision for resettlement) as contributing to the lack of any attempt to develop solutions to minimize the scale of evictions and disruption caused to those who had to move. Trauma is suffered by cemetery people who are forced from their homes in the tombs in which they have lived

for decades and in which they have often invested a considerable proportion of their income over the years. As well as losing their homes they often lose their possessions, as no warning is given before the bulldozers destroy their settlement. They often lose one or more sources of livelihood as they are forced to move away from the area where they had jobs or sources of income. Where provision is made for resettlement, this is almost always at a distant site where the people are expected to build, once again, their homes but on land with little or no provision for infrastructure and services. Selected sites for relocation in Cairo's eastern new desert settlements are far from places of work where the housing is too costly for low-income households, with 'low-cost' housing projects often ending up in the hands of middle class groups. Those evicted rarely receive any financial support for rebuilding.

The Government's programme aimed to stimulate upper and middle class residential construction by clearing the city's poor from strategically central areas of the Historical city. Needless to say, all of this was done in the name of government's concern for the welfare of 'less favoured' families, with legislation to protect 'the environment' as a justification for securing access to land for development. Such forced evictions within the cemeteries reflect the differences in political power within the society, where economic interests resort to the law or to municipal authorities who have the power to evict people 'in the public good'. The cemetery people, considered part of Cairo's urban poor, have a far weaker legal position from which to fight eviction or at least to negotiate concessions (for time and support for moving and acquiring alternative accommodation) and compensation. This fact is evident in the words of a female respondent,

> '..we contribute to the city's economy and support through our labour the very people who want us to move.… why then are we pursued so persistently?'

Or the words of a woman questioning the endless evictions which dispossessed the poor

> '… we do not claim much. We are not demanding free accommodation. We do no pretend that we are living like other Cairene middle-class. We wish to live in cheap housing .Why is it not allowed?'

Recent evictions were clearly not motivated by purely aesthetic factors, where financial gains were made from reclaiming illegally occupied land, much of which has increased substantially in value in the recent past. Once cleared of cemetery settlements characterized as a major obstacle in the path of 'prosperity and development', this land can be sold at great profit to commercial developers who will then construct 'luxury' accommodation and shopping centres. The eviction of *Bab al-Nasr* tomb dwellers was therefore attributed to 'redevelopment', to use the cleared land more intensively, where developers could make large profits by doing nothing more than clearing the site and holding the empty land for speculation. The authoritarian approach to implement eviction plans did not involve poor cemetery people and their organizations, with lack of negotiations of a compromise between local authorities undertaking the redevelopment and those groups who are to be evicted. If settlements are judged to be 'illegal', even if they have been there for

many decades, this is a convenient excuse to bulldoze them without compensation. Officials claimed that such '*slums* tombs' were centres of social problems, thus, evictions would not only make the city more beautiful but would rid it of squatters who commit crimes and threaten the security of other citizens.

There is a need for an overall strategy that sets *Bab al-Nasr* Cemetery within the general framework of an economy unable to create sufficient jobs and to provide affordable housing for a large proportion of its population. Yet the dilemma of *Bab al-Nasr* Cemetery cannot be resolved without a transformation of the average Cairene's attitude towards their squatter inhabitants. Whereas public opinion views the residents of the cemeteries negatively, often blaming them for their poverty and destitution, they should be given recognition for their positive response towards their homelessness and related problems. Both government and Cairo's wider society should cease to regard *Bab al-Nasr* Cemetery as a problem area but should take note of the way these people have created a community through their apparently marginalized and illegal society. The squatter settlements of *Bab al-Nasr* Cemetery represent a positive response by urban poor and by rural in-migrants to the deficiencies in social and economic services within Egyptian society. Finally, both the uniqueness of *Bab al-Nasr* Cemetery and its comparability with dynamic squatter settlements elsewhere should be appreciated before plans are implemented to move both cemeteries and their living residents out into new desert locations. Such a drastic relocation of tombs and resettlement of people threatens to meet likely failure, given the authorities' apparent misunderstanding of the complexity of this multifaceted society.

Spatial Contestation within Historical Cairo

The government's approach has been regarded as too 'tourism-orientated' and so has ignored local attitudes. Such an approach could lead to the 'disneyfication' of the Historical City as it ignores its role as the cultural and urban heritage for ordinary Cairenes (Sutton and Fahmi, 2002a). This would turn the Historical City into an open museum opening the possibilities for increased land prices and more property speculation. Since there is no local participation in the programme, residents and local merchants might prefer to sell or lease their property rather than face an ambiguous future. Whilst decayed buildings will be knocked down, except for major historical buildings, this would allow the development of open spaces in anticipation of future urban development. Moreover, 'tourism is a blunt instrument with which to finance conservation' (Dix, 1990: 395) and highly sensitive to economic and political fluctuations in both origin and destination countries.

Gentrification appeared to prevail over upgrading aided by the official plan to move people out of the Historical City, causing land use changes from residential to tourism, with 'repackaging' of conventional tourism. This involves an upward filtering of housing to the benefit of the more upwardly mobile middle classes through total renovation or renewal. Plans tend to knock down houses but preserve major historic buildings, with greater tendency to move residents to

Manshiet Nasser and Cairo's eastern New Settlements rather than to rehouse locals in the main historical spine. The related out-migration of local people, moving either voluntarily or compulsorily, will be paralleled by a reverse re-population by more professional and less artisan people bringing in craft workshops, galleries, and tourist accommodation which could replace housing for local residents in the main *al-Mu'izz* historical spine.

Rather, as many of the present local inhabitants as possible should be encouraged to remain, plus perhaps some new younger residents, students or Cairene equivalents of 'yuppies', living in rented dwellings perhaps resulting from the rehabilitation and re-use of older vernacular buildings, including monuments for which non-residential uses cannot be found. By seeking to pedestrianize narrow streets wherever possible and keeping cars out generally, rehabilitation should minimize occupation by more middle class gentrifiers for whom life without a car would be unattractive. New imaginative uses should be sought for old monuments after their restoration. The *caravanserail* or *oukala* near *al-Azhar* Mosque, *Wikalat al-Ghuri*, which has been successfully converted into an arts and culture centre, should serve as a model and inspiration.

Quite clearly the issue of the restoration of individual historical monuments versus the rehabilitation of the whole urban environment is raised. All too often restoration has been adopted without considering the need to upgrade the surrounding built environment. Policies elsewhere, as in Tunis and Algiers, as well as the 1997 UNDP Plan stress that to revitalize an historic monument involves the related upgrading of its urban setting. Monuments should be regarded as foci for the more general maintenance and rehabilitation of whole districts of the Historical City. Given limited financial and technical resources, the urban conservation process requires finding new uses for restored buildings within the historical clusters. Thus the wider improvement of the built environment is related to the enhancement of local commercial activities and improved access to heritage buildings.

Future Prospects of On-going Regeneration Strategy

In terms of rehabilitation it can be argued that Historical Cairo should be rehabilitated according to certain postulated priorities. Firstly, it should be rehabilitated for its own present residents who should be consulted and who should then be encouraged to participate in specific local projects. Secondly, the *medina* quarter should be rehabilitated for the rest of Greater Cairo's citizens because it represents their built environment heritage, albeit not always appreciated as such. Lastly, Historical Cairo should be rehabilitated for visiting tourists, both Egyptian and foreign, who may want to visit the main monuments and other less tourism-modified back streets of *Gamalia* and other districts. So rehabilitation should be socio-cultural in its orientation and should not primarily be economic development- orientated, that is to say tourism and a 'disneyfication' kind of renovation programme mainly for the monuments only. The built environment context or fabric of the many significant monuments should be maintained and upgraded together with some development of associated open spaces to better

display the various mosques, *madrassa*, *sabil-kuttubs*, etc. As Rodenbeck (1983: 26) advocated 'monuments should be saved, but to save them in isolation from each other and from their 'environment' would be a sterile waste of time.' Is it not time, he went on to ask (1983: 29), citing Hassan Fathy, that 'we built in the present with the future consciously in mind, and did so by choosing the most obviously tested and successful models we have, the configuration of the past?'

Merely to restore an old building without making it functional again merely invites a second phase of decay and dereliction. So community activities, commercial uses or tourist functions could all be introduced to help perpetuate the built environment heritage represented by Historical Cairo's hundreds of currently threatened historic buildings. Community involvement should be maximized through reform of the local governance systems to establish conservation-orientated committees, as in the *Madinah of Tunis*, which will act as catalysts and watchdogs favouring the rehabilitation of Historical Cairo. Local stakeholder groups should dominate such organizations. One ultimate goal should be to enable the people of Historical Cairo and of Greater Cairo to enjoy the social and cultural environment of the Old City while preserving the integrity of the historic monuments and stimulating economic development within the local community. There is a pertinent need to ensure that tourism is developed and managed without it contributing to the deterioration of the unique urban environment that has attracted the tourists in the first place.

Furthermore, no strategic plans have been developed and endorsed by the country's highest legislative and executive authorities, beyond the general objectives of conservation and enhancement of the architectural and cultural heritage contained in Cairo's Historical City. Nor has a clear set of conservation and rehabilitation strategies been adopted to guide action at the programme level. Each central and local agency is responsible for one aspect or another of the built environment, economic activity, or social life in the different quarters and houses. Each agency devises and implements interventions based on its own objectives, mandates, perspectives, capabilities, and resources (Serageldin, 1998). The lack of an integrative framework to give structure and coherence to the range of public and private activities that could be initiated in the historic districts is clearly reflected in the array of unrelated projects and ad hoc initiatives sponsored by international and bilateral organizations and donors (Serageldin, 1998).

In conclusion, therefore, UNESCO recommended the need to strengthen co-ordination among the various institutions involved in the rehabilitation of the site. It stressed the importance of adopting a comprehensive institutional Master Plan framework which would ensure better management of the site, with clear strategies, land use and building regulations; while investing adequate resources towards capacity building in the area of architectural conservation. UNESCO argued the necessity to ensure a compatible use and proper management mechanisms for restored monuments and the need for appropriate future functions for old buildings prior to starting their restoration. There is a need for more concern with decaying housing stock, improving awareness of the resident population about the objectives of the restoration campaign within their historic environment.

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12 Kerala's Strategy for Tourism Growth: a Southern Approach to Development and Poverty Alleviation[1]

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Introduction

Tourism is being promoted increasingly as a mechanism for economic development and poverty alleviation by international and national institutions including the World Bank (Brohman, 1996), the World Tourism Organization (WTO) (2004, 2005, 2007), World Travel and Tourism Council (WTTC) (2003, 2005, 2007), the UK Department for International Development (DFID) (1997a, b), and the Japan International Co-operation Agency (JICA) among others, and yet this is not reflected in the development literature which pays remarkably little attention to the potential of tourism in poverty alleviation. Tourism is too often treated separately from development, but in reality, the two concepts of sustainable development, and sustainable tourism development should be more closely integrated (WTO, 2001). Kerala, a small state in southern India (Fig. 12.1), has been innovative in linking the two concepts by planning for sustainable development through an increasingly productive tourism sector. According to Liu (2003), the potential of tourism to promote regional development through the consumption of a wide variety of local goods and services has rarely been realized. Hopefully Kerala, with its focus on the development of appropriate types of tourism for Keralan society, will succeed in revealing the capacity of tourism as a tool for achieving sustainable development and poverty alleviation.

This chapter examines Kerala's policies for developing its tourism industry: it focuses on selected tourism-based strategies to evaluate their potential for bringing about economic growth and poverty alleviation. The information supporting this chapter was collected during extensive empirical research by the author and reflects her interest in sustainable development in Kerala. It should be noted that the fieldwork was completed before the new Communist government, a coalition of the Left and known as the Left Democratic Front (LDF) assumed power in May,

2006, so policy changes are to be expected. The LDF has made it clear that tourism is one of its priority areas, together with traditional industries and IT (Kerala Government, 2007). Since assuming power the LDF appears to be following most of the policies inherited from the previous government, not least because several of these were instigated by the Communists.

Kerala, a Suitable Location for Tourism Development

Kerala is one of India's main tourist states and undoubtedly one of its most beautiful. Social development in Kerala is unusually high, with over 90% of the population being educated. Gender equality is widely promoted and as many highly educated women are to be found as men. Most families limit the number of children they have to two or at most three (Osella and Osella, 1999), 1.7 being the state average (Rajan, 1999) and there is widespread awareness of the importance of population control. Kerala is also unusual in having a social security system which, although limited, exceeds that of most other Indian states in terms of the proportion of state GDP allocated for this purpose. According to Rajan (1999), many in Kerala would be destitute were it not for relief provided by the state social security system.

Social advancement alone, however, has not seen poverty eliminated as Kerala remains one of India's poorest states, characterized by the contradiction of development without growth (Timberg, 1981; Osella and Osella, 1999; Parayil, 1999; Prakash, 1999). Unemployment of the educated remains a major problem in Kerala (Mathew, 1999). The distribution of Kerala's GDP (Table 12.1) reflects that, while agriculture and industry together contributed 36.2% of state GDP in 2002/03, the service sector, of which tourism is a growing component, contributed a major 63.8%. Industry, especially the service industries, have been state run in accordance with Communist principles, and privatization has been discouraged until comparatively recently. While Prakash (1999) argues that this has seriously impeded Kerala's development and seen it slide backwards in relation to other Indian states which have adopted privatization, there are others who differ in their opinion and hold firmly to Communist principles as the way towards socio-economic development (Isaac and Franke, 2002).

Since 1979, economic boom in the Gulf countries has attracted economic migrants from Kerala and at the height of Gulf migration, revenue from the Gulf was estimated to constitute over 25% of Kerala's GDP, and almost 50% in areas of high migration (Kurien, 1994; Prakash, 1999; Osella and Osella, 2000; Hari and Kannan, 2002; Zachariah *et al.*, 2003). However, income from the Gulf has been declining since the mid-1990s, and although it remains a major source of employment and revenue, more than 750,000 Keralite migrants have returned home (Nair, 2003) owing to domestic problems in the Gulf states and to the strictly limited duration of work visas. This, coupled with a national crisis in 1991, low levels of industrial production, the comparatively low value of many primary exports and devaluation of the rupee have contributed to Kerala's weak economic position (Prakash, 1999).
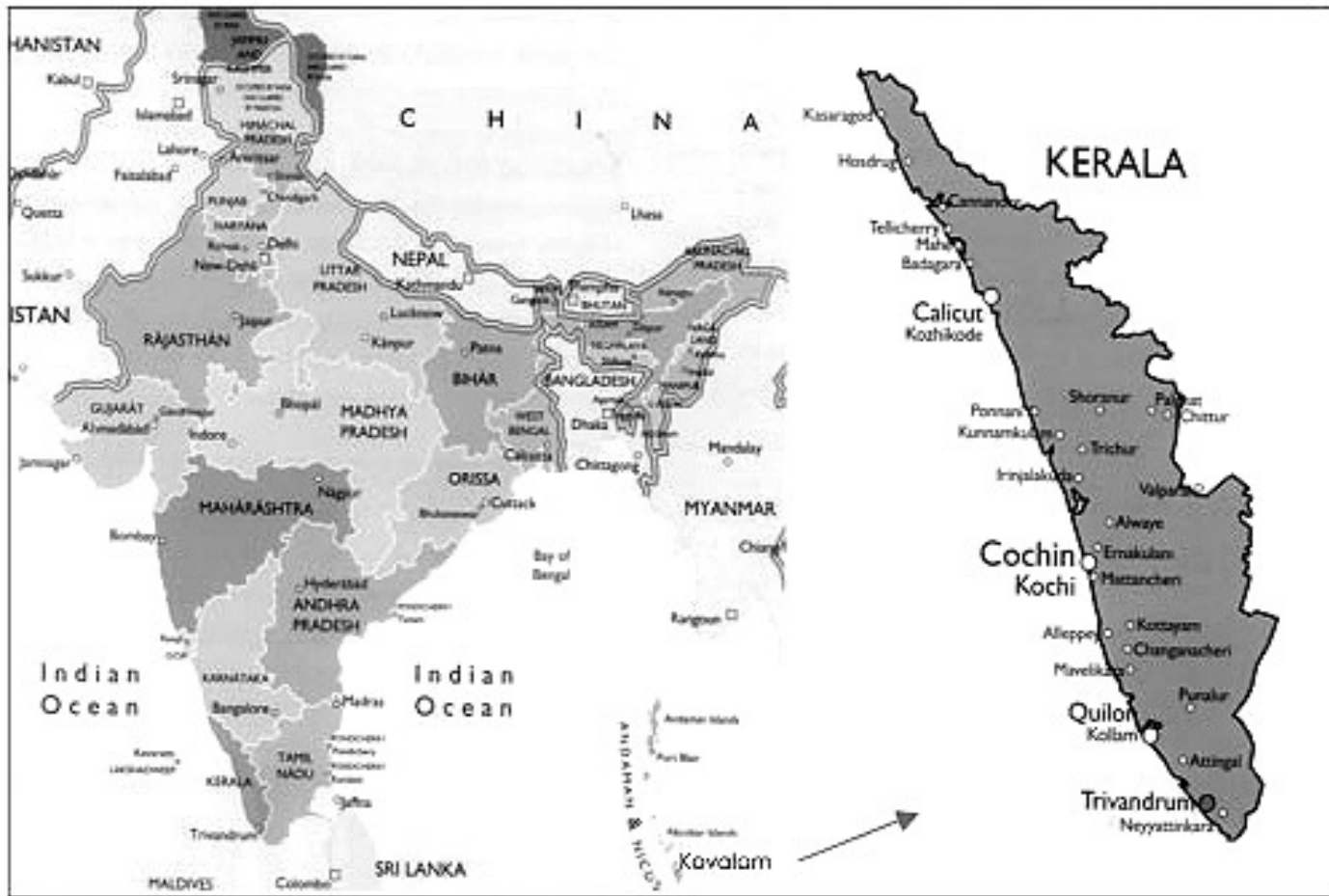
Fig. 12.1. Map showing the location of Kerala in south India.

Table 12.1. Sectoral share of Kerala's GDP, 2002/03.

Sector	Contribution to GDP (%)
Primary sector	
Agriculture, forestry and fishing	17.2
Mining and quarrying	0.3
Total primary sector	17.5
Secondary sector	
Manufacturing	9.7
Electricity, gas and water supply	2.6
Construction	6.4
Total secondary sector	18.7
Tertiary Sector	
Transport, storage & communication	9.7
Banking, insurance & real estate	24.7
Public administration & other services	29.4
Total tertiary sector	63.8

Source: Based on Table 3.6, Government of Kerala (2004)
Economic Review

In an attempt to further develop its own economic resources and reduce dependence on remittances, the Government of Kerala has turned to tourism, which has been growing rapidly and which attracted over 6.7 million visitors in 2006 (Government of Kerala, 2007). In 2003, tourism contributed less than 8% to state GDP (Table 2) but provisional statistics for 2006 suggest that this figure has risen to approximately 10% (Government of Kerala, 2007). Urged on by the WTTC (2003), which identified spare capacity, the former Kerala government intensified its strategy to expand tourism. The international market, representing only 5.5% of visitors, became the major target for expansion (WTTC, 2003; Department of Tourism, 2003, 2006), and in its *Vision 2025*, Kerala's government clearly aimed to make tourism central to the state's development strategy (Department of Tourism, 2003). Well aware of the problems tourism can cause, the former Kerala government was concerned about the expansion of tourism and its potential negative impacts on the natural and cultural resources responsible for its growth (pers. comm. Director of Tourism, Kochi, 2005). As a consequence, tourism policies were constructed with a view to achieving simultaneously the dual goals of sustainable development and poverty alleviation (Department of Tourism, 2005). Thus, Kerala was attempting to unite its 'tourism development' with a 'sustainable development' agenda by employing southern approaches to solve the pernicious problem of poverty.

Kerala constitutes a particularly interesting case study for several reasons: First, it has embraced tourism as a key tool in its development strategy thus following the direction of many of the world's largest institutions which now

support tourism as a mechanism for economic development and for poverty alleviation (Harrison, 1992; Brohman, 1996; Go and Jenkins, 1997; Christie, 2001; Markandya *et al.*, 2004; WTO, 2004; WTTC, 2005). Second, Kerala is interesting because it was the first state in India to elect a Communist government in 1957 and, although the Communist party has not always been in power (though it is at the moment), the ethos of Communism has always remained strong and has greatly influenced Kerala's approach to development. Third, Kerala has adopted an innovative strategy for its tourism development underpinned by its Communist principles. Theoretically, this could widen the opportunity for the poor to become involved in tourism either at the household level, or through cooperatives. This is possible largely because Kerala's substantial and reliable domestic tourism market opens considerable opportunities for development.

Characteristics of Kerala's Tourism Industry

That tourism does have potential for generating income is without doubt, but it does come with risks attached, especially if an economy becomes over-dependent on tourism. One of the greatest risks is where there is heavy dependence on the flow of international visitors (Baker and Coulter, 2007). Terrorism, fear of bird flu, and fashion attached to certain tourist destinations can see visitor numbers dwindle overnight. Kerala's tourism industry, however, has not really suffered from such global level shocks not least because of the cushioning effects of its substantial domestic tourism sector which is not deterred in the same way as international tourists, and which reduces the level of risk associated with heavy dependence on international tourism (Bosselman *et al.*, 1999). Much of the literature advocating tourism development, especially in the developing world, concentrates on international (western) tourists (Liu, 2003), but throughout Asia domestic tourism is growing, and this is no less true in Kerala. Indeed, all forms of tourism have been growing rapidly (Figs 12.2, 3, 4) and, in 2004, Kerala received 10% of India's international visitors (Department of Tourism, 2005).

There was a notable increase in tourists, both domestic and international, to Kerala in 1996 (Figs 12.2, 3), which coincides with the year when the then Congress government in Kerala started promoting tourism aggressively throughout India and overseas. It was also a time when electronic communication was increasing and this too helped to promote Kerala's tourism industry. Since then, as a consequence of the increase in tourist numbers, earnings from international tourism have grown almost exponentially (Fig. 12.4).

As Table 12.2 shows, tourism in 2003 contributed over 39 billion rupees (Rs) to Kerala's economy, 3.7% of its GDP, and more than double if these figures are combined with the indirect benefits (WTTC, 2003). The most recent estimates for 2006 suggest that this figure has risen to 10%, reflecting the continued growth of tourism (Government of Kerala, 2007). Of the 6.3 million tourists who visited Kerala in 2004, only 345,546 were international tourists, while the rest, some 5.9 million, were domestic tourists (Department of Tourism, 2005). International
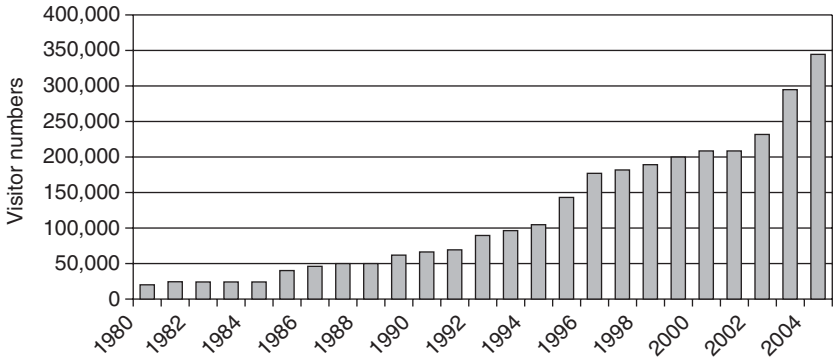
Fig. 12.2. Number of foreign visitors to Kerala.
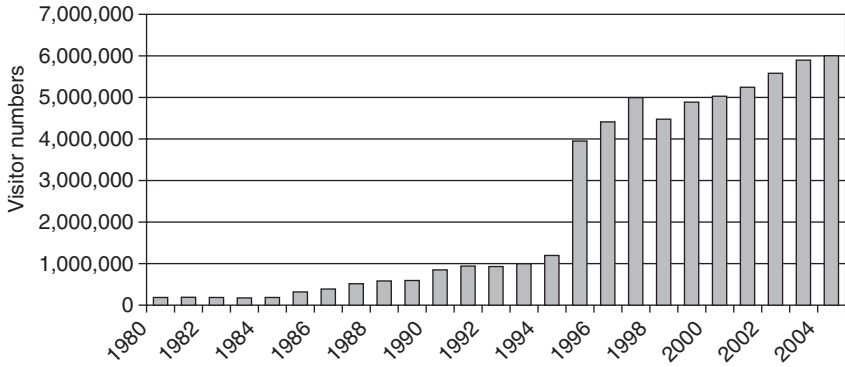
Fig. 12.3. Number of domestic visitors to Kerala.
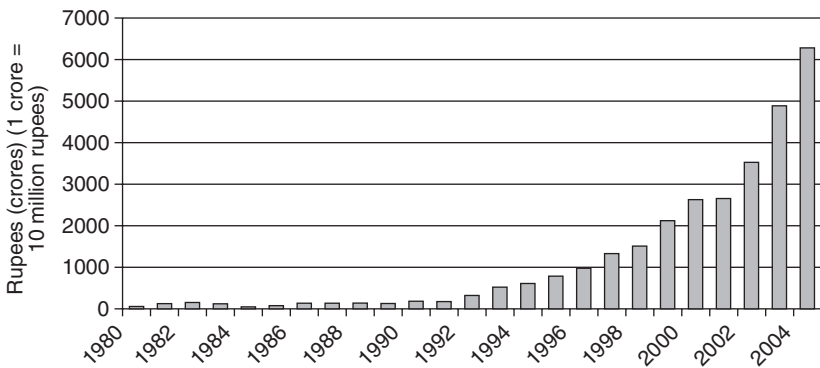
Fig. 12.4. Earnings from international tourism.

arrivals are concentrated in the November and March period, relatively dry, warm to hot months which are preferred by western tourists (Fig. 12.5). They still represent a tiny fraction of visitors to Kerala (5.5%), almost an insignificant number in comparison with domestic tourists who are much less influenced by seasonal variation in climate (Fig. 12.6). Domestic tourism is frequently overlooked (Ghimire, 2001), but the flow of domestic tourists brings Kerala substantial income, including 56.8% of direct and indirect revenue from tourism (Department of Tourism, 2005) (Table 12.3). However, when one considers that the domestic market which makes up 94.5% of visitors to Kerala, contributes little more than half the total revenue from tourism, this makes investment in international tourism extremely attractive. Regardless of this imbalance, domestic tourism is also being promoted strongly by the LDF, which is opening four new tourist offices in Hyderabad, Ahmedabad, Kolkata and Bangalore, centres where there is growing affluence and disposable income among the middle classes (Fieldwork, December 2006; Kerala government, 2007).

India's tourism market has been influenced by three eras in history: first, the traditional era going back to India's early history which motivated pilgrimage
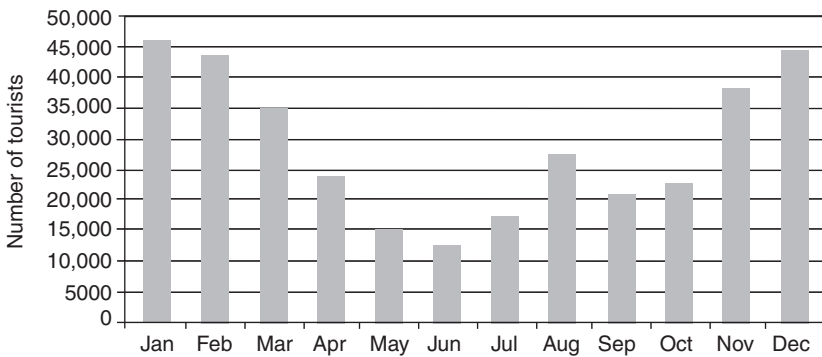
Fig. 12.5. Number of foreign tourists visiting Kerala in 2004. Source: Department of Tourism, Government of Kerala (2005).
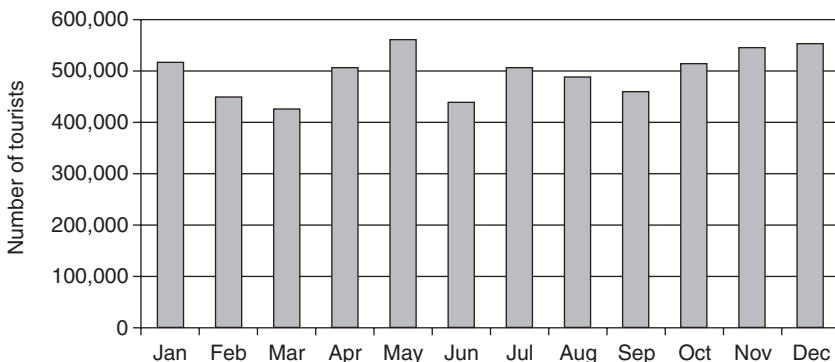
Fig. 12.6. Number of domestic tourists visiting Kerala in 2004.

and travel to fairs and festivals within India (Rao and Suresh, 2001). Second, the Mughal era which saw the growth of leisure, pleasure and relaxation and which encouraged the enjoyment of music, art and hunting, among other pursuits. Third, the colonial period, during which the British developed travel circuits complete with travel lodges. These served as rest houses for travelling administrators, circuit judges, and also for missionaries, tourists, and the families of administrators making for hill stations to escape the heat of the Indian summer (Kennedy, 1996). Legacies from these three periods in history are evident in the character of Kerala's tourism and in the locations of its tourist attractions (Rao and Suresh, 2001).

Some 60–70% of Kerala's domestic tourists are pilgrims to religious shrines, while some 5–10% are visitors to festivals. Visits to family and friends are frequently planned to coincide with festivals or pilgrimages, so distinguishing categories of domestic tourists from national statistics is extremely difficult. For the most part, all of these are low-spend tourists and so relatively 'invisible' in the analysis of tourism which normally involves an assessment of revenue (pers. comm. Deva Hospitality). The following example of the annual pilgrimage in January each year to the forest shrine dedicated to Sri Aiyappa at Sabarimala, (191 km north of Tiruvananthapuram) shows why a high proportion of domestic tourists contribute relatively little to Kerala's income from tourism. Aiyappa pilgrims come to the shrine from many parts of southern India and are identifiable by their black *dhotis* (sarongs), a symbol of the penance they must undergo for 41 days before they make their pilgrimage to Sabarimala. Most are male, though pre-pubescent and post-menstrual females can also participate in the pilgrimage (Bradnock and Bradnock, 2002). During the month of December, Sabarimala pilgrims are much in evidence in Kerala and before beginning their

Table 12.2. Contribution of tourism and travel to Kerala's economy in 2003.

Year 2003	Rs billion (£1 = Rs76)	Kerala's GDP (%)
Expected direct earnings from tourism and travel	39.3	3.7
Expected direct and indirect earnings from tourism and travel	81.8	7.7

Source: WTTC (2003) p.18.

Table 12.3. Income from tourism in 2004.

Year	Percentage of total income from domestic tourism (5.9 million domestic tourists)	Percentage of income from international tourism (approx 0.3 million international tourists)
2000	55.56	44.44
2001	56.91	43.09
2002	61.07	38.93
2003	58.82	41.18
2004	56.84	43.16

Source: Department of Tourism, Government of Kerala (2005).

difficult journey to Sabarimala they make several stops at major centres and places of worship. Although numerous, pilgrims contribute relatively little in economic terms to their host communities: most have very little money and sleep in the open; they may buy food or depend on the generosity of others; they travel by public transport and are often allowed to ride free of charge. Having said that, donations to the Sabarimala shrine rose from Rs 2.4 million in 1970 (£1 = Rs 18) to Rs 75 million in 1986 [£1 = Rs 18.5 (rbidocs, 2007)] (Bradnock and Bradnock, 2002), roughly a significant increase in real terms over the 32 year period, so clearly pilgrims do bring funds into Kerala (personal communication, Deva Hospitality, Kochi, 2006).

Aware of the relative poverty of many travellers and of the inadequacy of the pilgrimage destinations, the Government of India, under its tourism policy has determined to improve the conditions for travellers at sites of pilgrimage (Rao and Suresh, 2001). For example, at the Snake Temple at Haripad, which is between Alleppey and Kollam, observations between 2000 and 2006 confirmed that there have been improvements in parking facilities for coaches and also in the cleanliness of the washing facilities and lavatories. By making the facilities for tourists more attractive the aim is to further stimulate domestic tourism, however, the per capita spending power of traditional tourists is unlikely to rise significantly and any increase in income will derive mainly from an increase in tourist numbers.

Kerala hosts several festivals through the year and income from these is said to be higher than from pilgrimage tourism (personal communication, Deva Hospitality). One of the largest festivals is Onam, a harvest festival at the end of August and in early September. Onam Tourist Week is an extravaganza of art and folk presentations including *kathakali* dancing, elephant processions, fireworks, water carnivals and the renowned snake boat races in many of the backwater and coastal towns (Bradnock and Bradnock, 2002). Onam attracts thousands of visitors to Kerala every year and formal and informal social networks enable Kerala to meet the needs of these domestic tourists. Once again, the majority are low-spend tourists but tourist numbers are stable, none the less.

However, not all domestic tourists are pilgrims or festival tourists and the leisure holiday market is increasing with the growth of the Indian middle classes. Many are employed in IT and work for multinationals, so have increasing disposable income. An expanding number of Kerala's educated now work for call centres where comparatively high salaries fund a growing demand for holidays, including short breaks (personal communication, Deva Hospitality, Kochi, 2006). The domestic tourist market has also been enhanced by, for example, Indian Railways, which offer concessions on normal routes at certain times of the year, and holiday specials where travellers can benefit from Leave Travel Concessions (LTC). Similarly, while Indian Airlines and Air India offer LTC fares from mid-April to the end of July on domestic flights, the Federation of Hotel and Restaurant Associations of India (FHRAI) now also offers attractive packages for domestic tourists from April to September when international tourism is at its lowest (Rao and Suresh, 2001: 207). In addition to this, it was discovered that some professionals also receive subsidized holidays as part of their employment contract and that Kerala's beaches, hill stations, Ayurveda and

wildlife parks are important destinations for such travellers. Among domestic tourists coming to Kerala, non-resident Indians whose family homes are further north in, for example, Ahmedabad, Puna, Mumbai and Hyderabad, have relatively high spending potential and increasingly enjoy family holidays in south India (personal communication, Deva Hospitality, 2006). Where these are returnees to India from the West, they behave much like international tourists and have similar spending capacity. Yet another form of domestic tourism which is proving increasingly lucrative is business tourism. Furthermore, students from other parts of India coming to study Kerala's dance and music, or learn about tea, rubber, cocoa and spice production provide a growing educational tourism segment. It is evident how the domestic market is divided between a low spend majority and a small but rapidly growing medium to high-spend domestic sector.

In order to respond to the growing market in tourism (Table 12.3), Kerala under the Congress government started expanding its hotel sector, including the luxury end of the market. If Kerala's areas of natural beauty and cultural excellence are to be developed to appeal to western visitors, and especially if this involves private capital, then there is a possibility that the high cost of gaining access to beaches owned by hotels, for example, could reduce the accessibility of many domestic visitors and Keralites to some of Kerala's prime tourist areas. Thus the expansion of international tourism could significantly change patterns of access to Kerala's natural and cultural environment. An extreme situation could be what has happened in The Gambia where tension has been created by tourist hotels which deny Gambians access to their own beaches (author's field research from 1980 to 2003). Thus, an increased international tourist market could have very different implications for both domestic consumers of tourism, and also domestic providers of services for tourism.

Kerala's Strategy for Developing Tourism

Formal acknowledgment of Kerala's tourism industry came late. The Department of Tourism was created in 1950, and at that time was concerned mainly with state hospitality. The state did not acknowledge the significance of tourism as an industry until 1986 when Kerala's first Tourism Policy was launched (WTTC, 2003; Department of Tourism, 2006). Realizing its potential for attracting both international and domestic tourists, and realizing especially the earning potential of the international market, Kerala's congress government, through the Department of Tourism, established an extensive framework for developing its tourism facilities and encouraged investment to promote the sector's growth. Many of these initiatives are still in the new government's portfolio.

Investment incentives

In order to encourage investment in tourism, at any level, the state provides an investment subsidy equivalent to 10% of the investment of a project, with a

maximum investment of Rs1million (approximately equivalent to £12,500), and subsidized electricity for the majority of these ventures. The types of project eligible for the subsidy are numerous and clearly aim to stimulate large and small investors (Fig. 12.7). In line with the 1995 Kerala Tourism Policy, investment was also encouraged among non-resident investors, and especially non-resident Keralites with a view to attracting foreign currency (WTTC, 2003; Department of Tourism, 2006). The LDF are currently encouraging investment from within India and the Chief Minister has stated that, while Kerala wishes to attract investment, he is not yet ready to make visits overseas to encourage investors (Kerala Government, 2007).

Expanding hotel tourism

At one 'end' of the framework for tourism development – if it can be so perceived – the congress government encouraged mass tourism. Since the Tourism Act of 1995, new beaches and backwater resorts have been opened up by the Kerala Tourist Development Corporation (KTDC) which, in line with the Indian government tourism policy, had increased the number of hotels and especially budget hotels, restaurants and cafés to target both the international and the domestic tourism markets. Considerable effort has been invested in developing tourism at all scales, but with particular emphasis on international tourism. Major national and international hotel chains including Taj, Oberoi, Le Méridien, Best Western, Golden

Classified hotels – approved by State/Central Government
Motels – approved by the Department of Tourism, Government of Kerala
Restaurants – approved by Government of India Classification Committee
Amusement parks and recreation centres – approved by the Kerala Department of Tourism
Ropeways at tourist centres
Purchase of luxury cars (minimum of five cars) **coaches, boats, aircraft by tour operators** – approved by the State/Central Department of Tourism
Construction of structures such as auditoriums and institutions teaching traditional art forms of Kerala
Institutions teaching surfing, water skiing, gliding, trekking and similar activities promoting tourism
Ayurveda centres approved by the Department of Tourism
Building of traditional boats and houseboats
Exclusive handicrafts emporia
Source: Department of Tourism, Government of Kerala website *http://keralatourism.org/php/business/data/investment.html*; accessed 30/05/2006

Fig. 12.7. Projects eligible for subsidies or concessions.

Tulip, Casino and Mahindra established hotels and resorts in Kerala and, under the congress government were being encouraged to expand these hotels further. According to WTTC (2003), many of these have been developed with government funds but they were managed and operated by the national/international groups under the auspices of a subsidiary of the Kerala Tourist Development Corporation. In reality, the fastest growing sector among hotels, according to KTDC statistics (WTTC, 2003) is in the one to three star categories which, according to key informants in the tourism sector in Kochi, reflects growing demand mainly from the high-spending element of the domestic market. The LDF has said little about hotel development so far but it has ruled that in future, any major investments such as the Radisson Hotel complex sanctioned by the congress government in Kumarakom will be scrutinized by the LDF as there are concerns that Radisson is far too big and out of place in a small settlement. In other words, the appropriateness of the development is being taken seriously by the LDF.

Infrastructure development

A major problem area for the development of Kerala's tourism is the transport network and in an attempt to improve road and rail facilities Vazhiyoram centres, 'wayside amenity centres', have been planned (Department of Tourism, 2006). These are intended to make travel easier and promise to be somewhat like motorway service stations in the West, but with more leisure facilities. Vazhiyoram centres, as defined during the congress era, were to be uniform in style and privately operated by one enterprise, though they would involve some degree of local participation as owners of the land on which the centres are built automatically become shareholders in the centre. Whether the LDF adhere to the involvement of private entrepreneurs is not yet clear. They have, however, stated their commitment to developing Kerala's infrastructure and it seems unlikely that this will be possible without the inclusion of private funding. In addition to improving the road network in the state, the LDF is allegedly interested in establishing an airport in northern Kerala.

Within the hotel sector and in other aspects of tourism development, private-public sector partnerships were encouraged under congress and there is evidence that these are continuing under the LDF. In his discussion of a Third Way in tourism planning, Burns (2004: 35) argues for the development of institutions and NGOs which will 'enable beneficial relationships between actors'. During its time in power, the former Kerala government played a dominant role in facilitating such relationships, something that the LDF is continuing and which actively conflicts with neoliberal agendas which demand a reduction in government involvement (Shaw and Williams, 2004).

Homestays

At another location on the framework for tourism development are homestays and houseboats which aim to attract international and domestic tourists

interested in alternative styles of tourism, and especially in Kerala's culture and environment. Homestays are not new and have long served the domestic market virtually unnoticed. However, under the Heritage Home Protection Scheme (WTTC, 2003) homestays are being given a facelift to make them more attractive to the global tourism market. Incentives and subsidies are available to home-owners to improve the quality of their accommodation and services, and the environment around them, though not all homeowners have the necessary capital to renovate their properties, even with subsidy. Clearly, the size and quality of homestays will vary and, while some attract international visitors – though still on a limited scale, homestays are also attractive to domestic travellers. For instance, there is a clear market for homestays among those discerning Indians keen to experience Keralan culture at affordable prices. Homestays also represent opportunities for non-resident Keralans from the UK and the Gulf States, for example, to invest funds generated overseas in Kerala's tourism (Megarry, personal communication, 2006).

Houseboats

Besides the development of homestays, investment is also being encouraged in the backwaters, lagoon environments fed by the rivers flowing off the Western Ghats on to the alluvial plain bordering the coast. After the monsoon, when rivers from the Western Ghats are replenished by the annual rains, saline water which has penetrated the lagoons in the dry season is washed out to sea by the torrential flow of the rivers and replaced by fresh water. As the dry season advances and the rivers from the hills decline in volume, sea water moves back into the lagoons which again become saline. These lagoons with their unusual ecology are homes to houseboats, many of which are former rice barges, now converted to high quality tourist accommodation. Houseboats are not a new concept, having had a long history in Europe and, closer to Kerala, on the lakes in Kashmir. Nevertheless, the houseboat image is a major selling point for Kerala's tourism industry and most advertisements for Kerala include evocative images of houseboats on the backwaters. It is notable that private sector capital is playing an increasingly important role in the development of homestays, houseboats, and in other aspects of the tourism industry. This represents a significant break from Kerala's past where development via the private sector was shunned (Prakash, 1999). Under the LDF an extension of backwater development to the north of Kochi is allegedly planned.

Kudumbashree schemes

An important element of tourism development in Kerala is communicating the ideas of government to the people and here *panchayats* (local councils) play a critical role. *Panchayats*, for example, have played a key role in Kerala's *kudumbashree* project which aims to alleviate poverty among the poorest, mainly women, through cooperative action (Issac and Franke, 2002; PCGI *et al*.,

2002). The scheme has proved attractive to Keralites not least because of its name: the Malayalam term *kudumbashree* contains the morally engaging terms *kudumba* (family), and *shree* is a term of respect. Essentially, a women's representative from the local *panchayat* (local council) visits the poorest areas within the *panchayat* administrative area and holds seminars on the development of small business enterprises. Following this, women are invited to put forward, in writing, ideas they may have for small cooperative business schemes. If a project is deemed viable, the *panchayat* funds it for a 2-year period and, in addition, arranges appropriate training for the women, usually at a local College. The progress of the project is followed carefully by the *panchayat*, which encourages the women to become self-sufficient in their income-generating scheme. If, however, a project fails, funding is terminated.

Within a *panchayat* administrative area near Kochi over 200 such *Kudumbashree* projects had been funded by December 2004 and, at that time, about a dozen were succeeding well. These included the production of coconut oil from a small press, the making and packaging of soap, and the making of artificial flowers, sold for domestic decoration and for religious shrines. Undoubtedly the most successful of all the groups visited by the author, and one related to tourism, was a catering group. In under its 2-year probationary period, this group had attracted funding from a local bank. The women involved had been trained in cookery, presentation of food and business management and were much in demand as caterers for business and social events, and for festivals, and thus were involved in tourism. Other *kudumbashree* groups of women cleaned up after fairs and festivals, and were also involved in solid waste management (PCGI *et al.*, 2002; fieldwork, 2006), so indirectly related to tourism. Though cleaning may not appear as creative as the work of the groups described above, nevertheless, it enabled women to increase their incomes which in turn benefited their families and afforded them a sense of pride, dignity and self-respect in the home and the community.

What homestay and *kudumbashree* participants found particularly appealing was that they were their own bosses and with flexibility to enable them to carry out their household responsibilities. In each of the *kudumbashree* groups cited above the women were asked how they spent their time before their involvement in the projects. In every case they complained of having been tied to the house and bored; the opportunities presented by *kudumbashree* schemes were perceived as liberation (though they are not without their limitations). However, through tourism, incomes are being increased and livelihoods improved. The *kudumbashree* schemes which embody the spirit of Communism are very much favoured by the LDF, not least because *kudumbashree* was the creation of Thomas Isaac, currently Finance Minister in the LDF. *Kudumbashree* was developed with the specific intention of improving the lot of Kerala's poorest, especially women, but better-off women are increasingly being inspired by this approach, as are men.

Having reviewed some of the existing and proposed government initiatives to promote tourism development in Kerala, it is essential to evaluate the prospects of tourism as a tool for sustainable development.

Sustainable Development through Tourism: Evaluating the Prospects

Assessing the scope for expansion of tourism

The literature is clear that the basis of a successful tourism industry depends first and foremost on having a sufficiency of natural or cultural resources which can be turned into tourist attractions (Ryan, 1991; Liu, 2003; Mowforth and Munt, 2003). Kerala is fortunate in having an abundance of such resources. However, as Kerala opens up new areas to tourism, such as the Wyanaad in the north, for example, the Department of Tourism will have to be selective as to what it promotes, first, because funds for investment in tourism are not unlimited, and second, because tourist 'resources' are, to a large extent, socially and materially constructed, and to capitalize on any area of natural beauty requires heavy investment to make the resource accessible, affordable, constantly attractive, and live up to tourist expectations. In the case of Kerala, limitations in the physical infrastructure could constrain the success of tourism development, particularly where a tourism circuit involves travel from one part of the country to another. A concern also expressed by Liu (2003) regarding sustainable tourism development more broadly, was that much planning was focused on the supply end of tourism, that is, the sufficiency and adequacy of tourism attractions on offer, but insufficient attention was paid to tourist demand and especially to demand fluctuation. He observes that demand cannot be managed as can supply and argues along the lines of Levitt (1960), that there is no such thing as a 'growth industry' (as tourism is perceived to be in Kerala), only companies organized and operated to create and capitalize on opportunities for growth. While the Kerala government is indeed aware of the current seasonal flow of international tourists, nevertheless, over half the state's tourism earnings come from the domestic sector and so allow considerable protection from fluctuations in the flow of international tourists. Western tourists are always looking for new and different experiences (Ryan, 1991), and with its varied environment Kerala aims to satisfy such demands. However, competition for international tourists is fierce and standards will have to be high and prices competitive if the flow of international tourists is to be assured.

Capacity for local involvement through homestays

Developing a sustainable tourism industry – and one of sufficient size to increase development in the entire Keralan economy – is, according to Hitchcock *et al*. (1993), dependent on involving local people and the LDF is keen to do just that. By promoting Keralan culture through homestays, houseboats and Ayurveda, for example, the 'local' becomes part of the tourism product (Smith, 1994), enabling a wide range of Keralites to become involved directly and indirectly in tourism. Where income from tourism is accessible to local people, then tourism frequently meets with local approval. But the literature reflects concerns that, where resources accrue to a community, conflict can develop over the division of profits

(Liu, 2003). However, many of the problems of community-based tourism such as unification of the community, commitment, power struggles and division of resources (Harrison, 1996; Tosun, 2000; Meethan, 2001; Salazar, 2004) are, to some extent, avoided in the Kerala example as involvement in tourism is frequently at a household level. Struggles, where they inevitably occur, are usually limited to the family or household, and may involve neighbours but it is rare that an entire 'community' is involved in a dispute. And where the cooperative *kudumbashree* schemes profit from a venture connected with tourism, there are strict rules as to how income is managed and profits shared so that, in theory at least, the problems faced by community-based tourism are minimized. Here, too, differences of opinion as to how profits should be divided are inevitable but, for the most part, the strength of Kerala's Communist culture and the acceptance that the rules of the scheme have to be adhered to, does limit such squabbles.

Another distinctive element of Kerala's tourism policy is that, in the West, homestays and houseboats might be classified as forms of 'alternative tourism', and yet in Kerala they are very much 'mainstream'. Homestays aim to attract alternative tourists, both international and domestic, who wish to learn about the lives of their hosts and Keralan culture. Thus, fears that increasing tourism will lead directly to cultural erosion are, in theory, misplaced in the case of homestays because here, the visitor has to adapt. Having said that, homestays are likely to appeal only to a relatively small part of the international tourist market, to those tourists who are genuinely interested in Keralan culture and lifestyles. At the moment, demand for higher quality homestays comes predominantly from Indian middle class tourists, especially those from other parts of India, keen to learn about Keralan culture. There is also another perspective on homestays: Megarry (pers. comm. 2006) has shown that, as a result of the Kerala government's non-resident investment incentives, Keralites from overseas – the UK and the Gulf in particular, are building dwellings specifically as homestays. Some of these represent the luxury end of the market: they are expensive and allegedly attract the very rich, including celebrities from the UK wishing to holiday in relative privacy. Such establishments provide not only Keralan culture but, if necessary, will import Ayurvedic masseurs and other forms of relaxation and entertainment so respecting the privacy of their guests. These establishments still represent a tiny minority but could become a growing trend.

The range of tourists that homestays could attract is thus considerable and because of state government incentives, Keralan householders with any degree of wealth could, in theory, participate in the scheme. Even in the village of Belaram near Kochi, severely damaged by the tsunami in December 2004, there was interest a year later in creating homestays for both domestic and international visitors. The possibility of over-supply could be a limiting factor but the potential advantages of homestays are many. First, with tax incentives, the homestay initiative could result in significant improvements in the quality of domestic dwellings. Thus, tourism could make an important contribution indirectly to environmental management. Second, homestays are an affordable alternative to hotels and, if given the right marketing image, could appeal to a substantial section of the domestic tourism market, even the less expensive. Third, while homestays are generally perceived as affordable accommodation, at

the top end of the market they can be so elitist as to attract the wealthy tourist. Thus, while homestays might be classified as alternative tourism, and as alternative tourism is frequently perceived to be marginal in terms of its profitability in comparison with mass tourism (Wheeler, 1991; Butler, 1992; Pearce, 1992; Smith and Eadington, 1992; Griffin and Boele, 1997), homestays in Kerala, if marketed appropriately, could generate substantial income and would allow profits to remain within and be re-invested in tourism businesses.

Homestays could have a brighter future as an indirect consequence of recent developments in Kerala. Starting in Munnar, one of Kerala's hill stations, the LDF has begun the demolition of buildings illegally constructed on land leased by the government, in many cases decades ago, specifically for agricultural purposes. Also being demolished are buildings illegally constructed on land within 10 m of a highway, or 10 feet of a road. As a consequence, hundreds of buildings have been reduced to rubble and more have been condemned. Many of these have been erected to capitalize on the growing tourism industry, and in Munnar the demolition of illegally constructed hotels and homestays could reduce tourism accommodation in this site alone by 30–40% (Basheer, 2007; Confederation of the Tourism Industry of Kerala, 2007; Kumar, 2007; *The Hindu*, 2007; personal communication, Deva Hospitality). This is critical as the tourist population of Munnar is growing rapidly now that the road from Munnar to Kodaikanal is complete. Although some homestays are being lost as a result of this policy, the shortage of hotel accommodation could give a boost to the new homestay market, a feasible way for Kerala to increase tourist accommodation, and a way of directing income from tourism directly to Keralites.

Capacity for local involvement through houseboat tourism

The houseboat market draws the tourist close to Kerala's special lagoon environments and culture. Houseboats in Kerala are privately owned, usually by companies, and managed in much the same way as hotels (Department of Tourism, 2005). They are beneficial in that they draw on a range of services from within the locality (author's fieldwork, 2006). For example, managers of some of the houseboats at Allapuzha (Alleppey) live locally. For each houseboat the cook and his/her assistant live locally, food for the guests is purchased locally and the manager has an arrangement with local fishermen and vegetable sellers. Ice to keep food cool is produced locally. Cleaners live locally, the laundry is done locally, and the watchman who also lives locally resides 'invisibly' on the boat when guests are on board. A pilot and assistant for each boat, mechanics and maintenance staff are also locally based. Thus income from houseboat tourism does make its way directly into the local community where social capital may be critically important in determining who the beneficiaries are (Tveite, 2006 unpublished). Extending the benefits of tourism through Kerala is claimed to be of key importance to the LDF.

There is growing debate about tourism and the environment in Kerala, and especially about houseboat and the lagoon environments which, many argue, are becoming increasingly polluted. In spite of Keralan law requiring houseboats to be fitted with bio-toilets and waste disposal systems, the lagoons are showing signs of stress from the rapid expansion of the houseboat market and from an

increase in fertilizer residues in the waters (Bradnock and Bradnock, 2002). Alternative possibilities include opening up lesser used lagoons, favoured by the LDF, and limiting the number of houseboats in the lagoon areas presently in use. Interestingly, discussions with houseboat tourists, managers and local suppliers of goods and services revealed very different perspectives on carrying capacity: tourists on houseboats considered that current numbers of craft were more than sufficient for the lagoon environment and should not be increased or the 'peace for which we are paying' would diminish. This view was very much shared by officials in the Department of Tourism (personal communication, 2005) and to a large extent by houseboat managers. However, the views of service suppliers were very much divided between those more perceptive participants who believed that any further increase in houseboat numbers would both damage the environment and have a negative impact on tourist numbers in the future, and others who were less discerning and believed that if houseboat numbers continued to rise, so would the benefits from tourism.

Perspectives on the impacts of international tourism

There is considerable deliberation regarding the benefits of international tourism but few destinations would be without it. International tourism does run the risk of leakage, but even in such cases international tourist spending can bring benefits to the wider community as the following examples from Kerala show. The settlement around Kovalam beach (Fig. 12.1), for example, has grown significantly since the 1970s and patronage from tourists, including a significant proportion of international tourists, supports a growing number of gift shops, restaurants, small Ayurvedic centres, tailors and the staff they employ. More marginal participants in the tourism industry also benefit from international beach tourism, including men who sell cigarettes and sarongs imported from Bangalore, and women who sell fruit. Local transport also profits from tourism, though at Kovalam, scooter rickshaw and taxi drivers at taxi ranks complained that the growth of package tourism had had a negative effect on their returns. Transport for package tourists was increasingly organized by tour operators on a group basis and bypassed these local entrepreneurs whose income had not increased at the same pace as had tourist numbers to the area over the past decade. Nevertheless, incomes had increased, largely due to the increase in international visitors to the area (author's fieldwork, Kovalam 1996–2005).

Another example from Kochi shows that international tourism has brought stability and increased income to transport suppliers. An attempt to explore the impact of tourism on taxi drivers revealed two separate groups of drivers: first, those working for taxi businesses which provided taxis for tourists at hotels with which they had an arrangement, and second, taxis at taxi ranks. The first group provided high quality, reliable cars, minibuses and coaches to hotels and other institutions around-the-clock and for 12 months of the year. Their drivers were well qualified, respected among the taxi-driving fraternity and smartly dressed in uniforms. Focus group discussions with drivers from such transport companies revealed that when tourism was less well developed in Kochi most of these drivers

were part of the informal sector, but now had permanent jobs. Drivers had been working with the same firm for as much as 7 years, during which time some had accumulated substantial savings, sufficient in the case of one to purchase a much bigger house, in the case of another to have a house built, while others used salaries for the purchase of consumer goods, for family holidays, for costs associated with their children's education, right up to tertiary level, and for social commitments, including festival celebrations, weddings and funerals.

These particular types of transport companies specialized in drivers who would take visitors on trips which might last for several days and a disadvantage of this was that, at the peak of the international tourist season, the drivers rarely spent a night at home. The compensating factor was that they received good rates of pay, frequently supplemented by good tips from tourists with whom they built strong relationships. In several cases, domestic and international tourists either on subsequent visits to Kerala, or on recommendation from friends, would call upon the services of these same drivers. Competition was increasing among such transport companies but increasing demand together with skilful management was pushing standards higher and, as a consequence of tourism, was creating sustainable livelihoods.

Discussions with taxi drivers at taxi ranks in Kochi provided a different perspective. These drivers were not in direct competition with drivers from taxi companies described above. They were dependent on tourists, both international and domestic for short journeys, either shopping or same day sight-seeing trips. Several of these drivers owned their cabs, though many also drove for other owners. Focus group discussions at taxi ranks revealed that incomes were supplemented by tips, especially from international tourists. None of these taxi drivers would countenance being a driver of the type described above, the reason being that they preferred not to stay away from home. Most found income from day-time taxi driving to be adequate, though qualitative indicators revealed that company taxi drivers (above) earned more. In typical Kerala fashion, no one would indicate whether one job had a better status than another as all work that was honest was said to be equally worthy. For both groups it appeared that tourism, and especially international tourism, was bringing tangible benefits to the local community.

Negative perspectives

The paragraphs above consider the impact of international tourism from the perspective of the supplier of tourism services, but what about domestic consumers of tourism, and Keralites not involved in the tourism industry? Fig. 12.8a is a notional diagram showing the approximate relative proportions of different types of tourists to Kerala: first, the largest circle represents 'traditional' low-spend domestic tourists, mainly pilgrims, festival visitors, and those holidaying with family and friends. Next is the group of middle class domestic medium-spend tourists and the lower-spend international tourists, including backpackers and the cheaper end of the package tourism market. And finally, the smallest circle represents a minority of international tourists together with non-resident Indian tourists, both with high-spending capacity. It is this group which

the former Kerala government hoped to expand. However, it could be argued that international tourism, while good for the economy of Kerala, may not be good for lower-spend domestic tourists and many Keralites. Fig. 12.8b is also a notional diagram which constructs access to tourist space and resources by these three groups. It could be argued that, if international tourism increases, and if tourism resources become increasingly privatized and regulated, a form of the 'tragedy of enclosure' (*The Ecologist*, 1993) could result with the majority of domestic tourists, and many Keralites, being unable to afford access to Kerala's natural and cultural heritage. However, with the Communist government in control, this trend of privatization seems less likely to continue unabated.

There is already evidence of Keralites being unable to enjoy their own environment as a result of tourism, but for reasons different from those above: Kovalam, one of Kerala's beach resorts, has acquired a sleazy reputation and tourism has allegedly seen drug abuse increase. Many Keralites in Trivandrum will no longer go to Kovalam because of 'cultural pollution'. The former state government was anxious that development at beach resorts should be constrained in some way, though how that was to be achieved was unclear. Attracting the 'right sort of tourists', generally high-spend and with low environmental and cultural impact is what tourist areas are always seeking and

(a)

Domestic tourists – pilgrims, festival visitors, tourists visiting families and friends (low-spend)

Middle class Indian and international tourists (medium- to high-spend)

International tourists, mainly western and non-resident Indian (high-spend)

(b)

Access to resources by traditional domestic tourists and many Keralites could decrease

Access to resources shared by all could decrease. Domestic tourists could be marginalized

Access to resources by middle class Indian and international tourists could increase significantly

Fig. 12.8. (a) Notional diagram representing the different types of tourist in Kerala and their spending capacity. **(b)** With a significant increase in international tourism, notional access to resources by the groups in (a) could change.

so hotels attracting the better-off western tourist are being encouraged. At the same time, as part of the Indian government's efforts to encourage domestic tourism, Kerala has seen a faster rise in its one to three star hotels, suitable for the budget domestic traveller (Rao and Suresh, 2001). The question is, will these hotels also invite western budget holiday makers, some of whom (though not all), are low-spend tourists and are associated with environmental and cultural insensitivity?

A further negative effect of increasing international tourism is that airline connections to Kerala will have to be improved, as will rail connections. Second, infrastructure, particularly relating to the road and transport network and to water supplies and sanitation in peri-urban areas will need to be extended. This will require major investment which could take years to get under way and, along with these key issues, another which needs to be addressed is the issue of waste disposal. Such facilities are needed for Keralites and one argument is that a larger international tourism sector could hasten their arrival, assuming the necessary investment could be attracted. However, evidence in Kovalam has shown that the provision of services such as clean water to hotels can leave the local population short of such resources, and similarly, effluent from hotels has polluted the domestic water supplies of nearby dwellings. This has been identified by the author (fieldwork, 2000).

In addition, there are many in Kerala who are opposed to a development strategy built on tourism, not least because of its cultural implications. Returning to the issue of women's involvement in the economy, the growth of tourism could, in theory, open up opportunities for women but there are major cultural problems associated with this. Keralites are very protective of their women and do not like them mixing with tourists, especially foreign tourists, so this is one reason why relatively few women working in tourism have managerial positions. Fieldwork in Kochi revealed that Keralite women working in tourism frequently did some of the most menial work such as cleaning in hotels. This was perceived as socially acceptable as the women did not have to interact with foreign tourists. It was evident in focus group discussions that many of these women were well educated, having completed secondary school, and from a sample of around 30 such women, over half had Bachelors' degrees and two had Masters' degrees (pers. comm. Embleton-Smith, 2005). Where women were needed for jobs that required them to interact with tourists, such posts were frequently filled by immigrants from Mumbai and other parts of India. There thus seems to be a dilemma: Kerala has an abundance of educated women, yet social constructivism about the risks of interacting with tourists means that their skills cannot be put to good use in an industry designated to be a major part of Kerala's economy. Encouragingly, one of the most respectable jobs that a woman can have in the tourist sector is running a homestay, as here she would have the moral protection and support of her family.

Conclusions

The sensitive way in which Kerala's tourism policies have been constructed to maximize widespread involvement of Keralites and, where corporate activity is involved, to encourage equitable distribution of profits suggests that tourism in Kerala could lead to sustainable development and thus contribute to poverty alleviation. However, promotion by the former government of international tourism over the domestic sector could limit the potential benefits of tourism as a mechanism for achieving sustainable development for the people of Kerala. Significantly increasing the numbers of high-spend tourists in tailor-made hotels and resorts at the rate of 7% per annum (Department of Tourism, 2003) might result in much desired economic growth, but not necessarily a widespread improvement in social welfare and poverty alleviation. It could also result in what is perceived as the 'tragedy of enclosure' (*The Ecologist,* 1993). Returns from the international tourist sector could trickle down, but unless the benefits of tourism are visible to Keralites, tourism of this nature could alienate an even greater proportion of the population than is already the case (Doxey, 1976; cited in Cohen, 1984).

On the other hand, the LDF's support for homestays and its recent policy of demolishing buildings on encroached land, many of which provide tourist accommodation, could indirectly encourage the development of the homestay market, though subsidies for homestay development would have to be sufficiently attractive. A tourism industry which took tourists directly to the people could become most attractive to the postmodern western visitor seeking some degree of authenticity and difference from their normal experience. Kerala's homestays are already attractive within India and developing an expanded homestay sector for the higher-spend Indian tourist, including non-resident Indians, could be a highly effective way of increasing tourism revenue and distributing it through the population. Linked with the development of homestays, Kerala could also promote tourism as a modern form of the traditional pilgrimage (MacCannell, 1973), so making Keralan culture and tradition part of the state's tourism product (Smith, 1994). This would widen participation in tourism and give visitors (both national and international) greater experience of Keralan society and environment.

With the Kerala government's pro-poor orientation (*The Hindu*, 2006), with the state's rich resource base and with its high levels of social development, Kerala could soon provide us with hard evidence that tourism, managed in Kerala's singular way, is contributing towards poverty alleviation and sustainable socio-economic development. We await developments.

Endnotes

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13 Tourism and Kudumbashree: a Southern Solution Empowering Women through Tourism[1]

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Introduction

Employment in tourism in the southern Indian state of Kerala (Fig. 13.1) is predicted to grow by 11.6% per annum over the next ten years, creating 1.4 million jobs for a population of over 31 million Keralites (WTTC, 2003). Whilst this figure accounts for employment both directly and indirectly in tourism, there remains little research into the indirect employment opportunities of tourism in Kerala. Tourism has been hailed by many as a vital tool for development in many parts of the Third World. Whilst a fierce debate rages with regard to the suitability of tourism for sustainable economic development, the rapid growth of international tourism in the Third World demands greater attention be paid to the socio-economic impacts of tourism on livelihoods. Despite a recent emergence of interest in 'responsible' and 'pro-poor' tourism, little empirical work has been carried out that focuses on the financial benefits of tourism within wider communities. This chapter examines the extent to which poverty alleviation and empowerment can be facilitated by the development of tourism in Kerala.

Kudumbashree is a scheme initiated by the Keralan state government. It is a participatory development programme focused on women, which aims to alleviate poverty in the state and encourage female empowerment (PCGI, 2002). The scheme organizes poor women into groups of between 15 and 40. The groups are highly structured, containing a clear hierarchy, and are each part of a larger system of groups and committees responsible for their development. The scheme encourages women to develop their own enterprises using micro-credit, micro-finance and thrift development initiatives. An important part of the scheme is the weekly contribution of a small amount of money by each woman into a communal bank account. This generates capital which finances loans for the development of small businesses. These enterprises range from animal husbandry to textile manufacture; brick making to food production; laundry
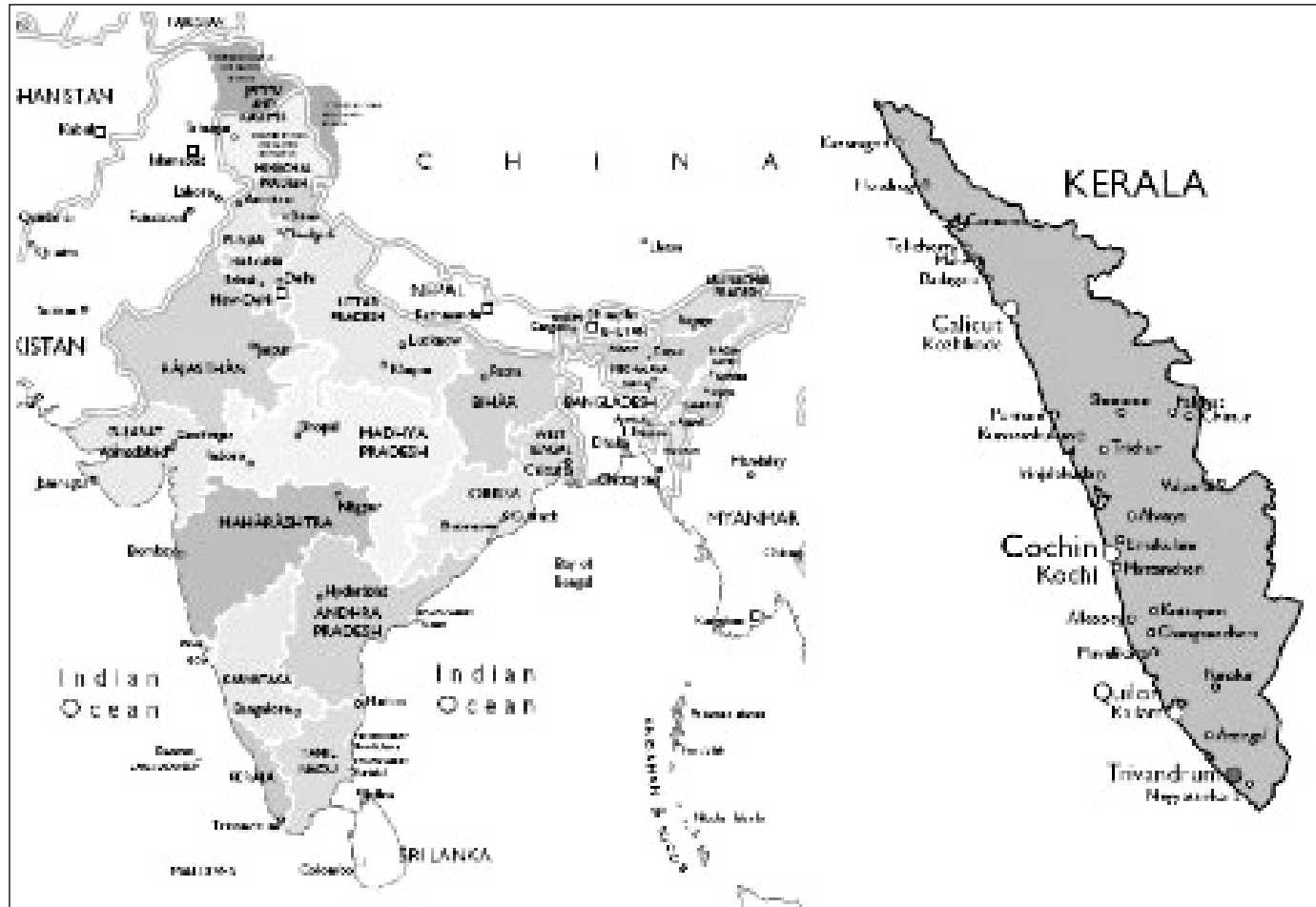
Fig. 13.1. Kerala, India.

services to solid waste management and several have been able to target Kerala's growing tourism industry. For example, Kudumbashree-run restaurants and handicraft production employ many directly in tourism and there are numerous enterprises that financially benefit from the presence of tourists. This chapter discusses a range of these businesses, focusing on solid waste management and handicraft production to illustrate the importance of tourism to sustainable livelihoods.

Whilst there are, of course, differing arguments with regard to women's involvement in tourism, the predominant view in the literature is negative. The following section outlines some of the evolving debates concerning the role of women in development schemes in the Third World, the suitability of tourism as a tool for development, and the position of women within the tourism industry. In the final part of this section an overview of the unique features of Kerala's tourism industry is given in order to provide a background to the remaining discussion.

Women and Development

The argument that has been generated around the suitability of 'participatory' development projects in an attempt to move away from 'outside' initiated development is well versed (Mikkelsen, 2005). This discussion has, in particular, looked at the role of women within such 'participatory' development projects, as they tend to occupy marginalized roles (Cleaver, 1999; Cornwall, 2000). Whilst not an original concept, the Kudumbashree scheme, as a female-only initiative, attempts to address the problem of male bias (PCGI, 2002). Despite its grass roots application, Kudumbashree is characterized by a hierarchical, top-down structure which, crucially, is run by a predominantly male head office. The scheme has been based on two decades of debate on the role of women within Third World development. As feminist thought grew, the 1970s saw academics and development practitioners alike beginning to recognize both the negative effect of past development policy on the livelihoods of women, and the crucial role women could play within future development (Boserup, 1970). Young (2002) outlines the varying approaches to this analysis, identifying the move from 'Women in Development' (WID) to 'Gender and Development' (GAD) and then 'Women and Development' (WAD) (see also Bhavanani *et al.*, 2003). This subtle change in title belies the importance of these evolving perspectives; the totality of 'gender' as an analytical tool was rejected as the issues of poverty, global positionality and class were accepted as crucial additional factors in the development of the livelihoods of Third World women (Waylen, 1996; Peake and Trotz, 2002).

In their consideration of the importance of class relations to existing gender narratives, Sen and Grown (1987) were crucial to this debate, highlighting the need to listen to the 'voices' of the women of the Third World. The Kudumbashree scheme could be seen as a product of this progression of ideas. Moreover, it is significant as a successful participatory development programme that was conceived and implemented in the Third World, an answer to

arguments against internationally dictated development (Escobar, 1995). It is, thus, a southern solution to a southern problem. The scheme grew from the movement away from top-down development programmes, towards the now popular Self-Help Groups (SHG), which in Kerala have been aimed predominantly at women (Anand, 2002). Bunch and Carrillo argue that through women-focused grass roots projects, feminists believe that 'women [will] undergo the process of empowerment that enables them to become significant shapers of the direction of development policies locally and globally' (Bunch and Carrillo, 1990: 82). The Kudumbashree scheme is one such example of a grass roots initiative. Figure 13.2 shows the stages of progression envisaged: from community-based organization to poverty reduction.

Tourism and Development

Whilst dependency theorists such as Britton (1982, 1989) might argue that tourism development in any form is not appropriate as a tool for development as it must rely on foreign markets, the existence of a sizeable, and growing, affluent Indian middle class (Jithendran and Baum, 2000) seems to reject this overly simplistic view. Moreover, the concern that the tourism industry is highly seasonal and vulnerable to external shocks (Baker and Coulter, 2007), and is therefore not an appropriate tool for development, is of less significance to India, with its well established domestic tourism trade often built on festivals and religious celebrations (Richter, 1989). There are often calls for increased community participation in the development of tourism in the Third World (Shah and Gupta, 2000). Indeed, despite the problematic task of defining 'community', and the suggestion of alternative development that is often idealized and unrealistic, terms

KUDUMBASHREE: a three tiered CBO
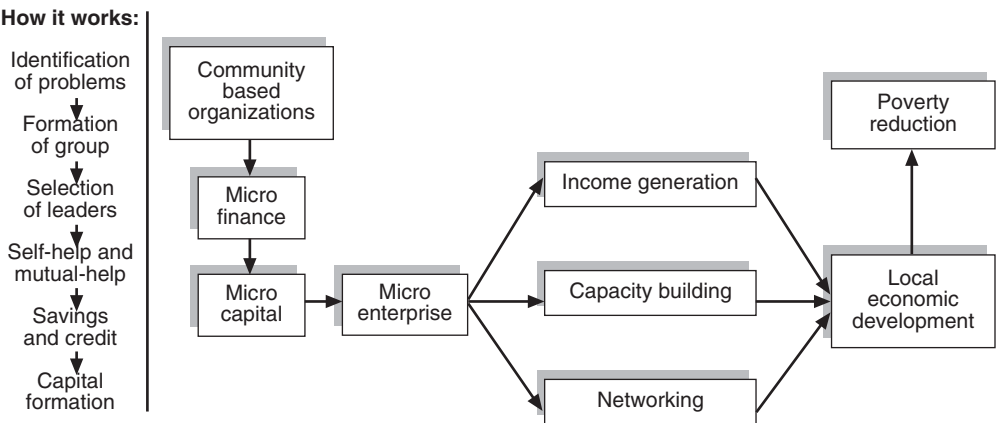
Fig. 13.2. From Kudumbashree to poverty reduction. The factors involved in the progression from group instigation to local economic development and thus poverty reduction.

such as 'community' or 'alternative tourism' have become buzz words within the academic and industry literature (Brohman, 1996). Recent work carried out by the Overseas Development Institute (ODI) to develop a framework for 'pro-poor' tourism has instead a realistic appreciation of the functions of the global market, political realities within Third World countries, and the role of local elites in the promotion of tourist development that is both economically viable and beneficial to the poor (Ashley *et al*., 2000; ODI, 2006).

In the last 15 years the possible benefits of tourism for Kerala have been hotly debated (Sreekumar and Parayil, 2002). Though hailed by many development studies as the great 'Keralan model' (cf. Parayil, 2000), there exists a 'paradox of development' (Thomas, 2005: 763), as achievements in social development (Ramachandran, 1996) have been made without economic growth. As a result, the Keralan government has looked to tourism as an avenue of economic development. The development of businesses within tourism and other sectors by large numbers of the Indian middle class was facilitated by the Indian economic reforms of 1991 (Corbridge and Harriss, 2000; Drèze and Sen, 2002). Whilst there remain, as elsewhere in the Third World, financial leakages of tourism revenue (Hemmati and Koehler, 2000), the growth of indigenous-owned homestays, for example, has begun to redress this imbalance. As has been shown in Bali (Wall and Long, 1996), indigenous-owned enterprises spread financial benefits to the wider community, as locals are employed in various positions.

Routledge (2000) argues that the Indian government's tourism development policy, in its promotion of luxury, international tourism, does not deliver the desired 'multiplier-effect', so often cited in favour of tourism development. Instead he suggests that this type of development 'necessitates the marginalization of the needs of the local population' (Routledge, 2000: 2647), as communities lose control of their natural resources. Whilst in the case of development by multinational companies this may well be true, Routledge does not consider the role of the small-scale indigenous entrepreneur within his analysis. Indeed, the case of the Kudumbashree, to be discussed below, highlights the reverse; the needs of the local people are directly met through tourism.

Women and Tourism

The tourism and development literature seems to have a somewhat disjointed focus on women's employment in the Third World. Whilst the latter has a well developed debate concerning the empowering potential of female employment (Murthy, 2001; Datta and Kornberg, 2002; Parvin, 2005), the former is overly concerned with the negative impacts of tourism, and has for sometime ignored the possibility of emancipation through tourism employment (see Apostolopoulos *et al*., 2001 for an example). Indeed, much of the literature with regard to tourism and women can be divided into two broad sections: that concerning the damaging impact of sex tourism (Hall, 1992; Ryan and Hall, 2001), and that discussing the subordinate roles occupied by women in the workforce (Levy and Lerch, 1991; Burrell *et al*., 1997). A preoccupation with

these subjects has drawn the focus of research away from analysing the impact of tourism on women's livelihoods.

Sinclair (1997) has been vocal in her call for an appreciation of the importance of a gendered analysis of tourism. She moves beyond previous contributions to the gender and tourism debate (Kinnaird and Hall, 1994; Swain, 1995), editing a collection of articles with their focus on the gendered structuring of employment in tourism. Whilst the extent of female employment in tourism is acknowledged, there remains a preoccupation with the impact of tourism on gender interactions; it is argued that involvement in the tourism industry reinforces gendered divisions of labour (Long and Kindon, 1997; Bras and Dahles, 1999). There is extensive work examining the impact of the employment of women in tourism in developed nations, where gendered stereotypes are often maintained (Momsen, 1994; see also Holden, 2005). When such arguments are applied to the development of tourism in the Third World, however, there appears to be a lack of appreciation for the importance of the very real sociocultural differences that exist. There is often a failure to appreciate the position of women in these societies as a whole, making straightforward comparisons between these global regions unrealistic. Indeed, Cukier *et al.* (1996) appreciate the significance of gender as a 'cultural phenomenon'; if fundamental changes in gender relations are to occur, 'culture' must also experience a radical alteration. The feminist argument fails to take into account the significance of the empowering potential of independent income generation by women. Holden rightly notes that it is 'important to realise that women are not just impacted upon by tourism but will also respond to opportunities for tourism' (Holden, 2005: 198).

The role of this chapter is not to provide a critique of the social constructions of place and representations of 'the other', as is common in Third World tourism debates (Urry, 1990), it is instead concerned with the tangible effects of tourism income on the creation of employment opportunities. Whilst there have been concerns about the impact of visitor/host interaction on women (Harrison, 1992), some hail this interaction as an important step in the development of women's autonomy; their experiences of other women might enable an exchange of ideas about the constructions of gender within their own societies to develop (Swain, 1995: 4).

Although Kinnaird and Hall (1994) are right to emphasize the significance of the sociocultural, economic and political contexts to the nature of female participation in tourism, there is evidence of women utilizing their skills to seize opportunities in tourism across the Third World. Scheyvens (2002) has presented examples of women developing their own enterprises in response to the emerging tourist market. She discusses the importance of revenue gained through tourism to the social and psychological empowerment of women, as they experience increased self-esteem at their ability to diversify their livelihood. In this way, Scheyvens argues, women should not be seen as victims of tourism, rather as resourceful entre-preneurs, adapting to new opportunities. It is acknowledged that women's work in tourism is often not featured in employment national statistics, as they often occupy informal roles, or work 'behind-the-scenes' in family businesses. Whilst the vulnerability of informal work has been highlighted by some as an illustration of women's subordinate role within tourism (Sinclair, 1997), studies have shown the

importance of flexible employment to women who must juggle paid work with domestic responsibilities (see for example Wilkinson and Pratiwi, 1995; Cukier, 2002). Indeed, Hemmati (2000) discusses the various roles inhabited by women within the tourism industry, identifying tourism as a possible means of poverty alleviation.

Keralan Tourism

The tourism industry in Kerala takes a different form from that in many countries in the Third World. Whilst there are undoubtedly similarities in the pace of development, and some of the types of tourism now familiar with tourist hotspots such as Thailand, the industries' historical and future development look quite different. Possibly the most important factor to mention here is the existence of a sizeable domestic tourist market. Kerala's tourism income is far more reliant on Indian tourists than foreign markets. The ratio of foreign to domestic tourists in 2001 was 1:24 (WTTC, 2003). This market is dominated by activities such as pilgrimages, Ayurvedic health treatments, and festival visits. Whilst there exists an ever-growing number of foreign tourists visiting Kerala for beach and backwater holidays, in sheer numbers, domestic tourists are of far greater significance to the industry (WTTC, 2003). Baker and Coulter (2007) discuss the vulnerability of beach vendor's livelihoods in Indonesia. Having cut ties with their agricultural roots they are entirely dependent on the foreign tourist market. These livelihoods are highly susceptible to local shock events such as the tsunami (December 2004) and Bali bombings (October 2002 and 2005), and global crises. The predominance of domestic tourism in Kerala, however, gives a degree of security to the tourism industry that is vital to the hundreds of thousands of people employed directly and indirectly in tourism. Moreover, the problem of seasonality, often cited as a negative aspect of tourism as a tool for development, is of less concern. The growth of 'monsoon tourism', as northern Indians travel to Kerala to witness the great rains of the summer period, has even taken advantage of poor weather conditions. Whilst figures for international tourism indicate a sharp drop in arrivals during this season, this type of activity, coupled with numerous festival events, serves to keep domestic arrivals at a virtually constant level. Whilst there are arguably entirely different cultural practices between northern Indians and Keralites, the issue of cultural erosion due to tourism is also lessened (see Smith, 1997). Indeed, much of Kerala's tourism marketing entices the northern population with different culinary, dance and theatrical experiences, together with the warmth and friendliness of Kerala's people (personal communication, Dax Gueizelar, Manager Deva Hospitality). There remain, however, essentially similar cultural practices and moral norms that prevent clashes between the host population and domestic tourists.

Methods

The data used in this paper were generated during two, month-long fieldtrips to the area around the Keralan state capital Trivandrum in June 2005 and July

2006. Whilst the research took empowerment as a result of the Kudumbashree scheme as its foremost concern, evidence of participation within Kerala's rapidly expanding tourist industry soon became a central theme. Following a short pilot study to investigate the broad issues affecting members of the groups, 15 SHGs were studied in greater detail. Four of these were rural, in villages around Trivandrum, the remainder in urban areas of Trivandrum City. A 'snowball' sampling method (Lindsay, 1997) was used. Several key contacts acted as 'gatekeepers' (Mandel, 2003), introducing the researcher to different SHGs. Though some have argued that this sampling technique narrows the range of people included in the study (Valentine, 1997), the diverse range of gatekeepers ensured that this was not the case. The age of the women in the groups ranged from 18 to 79 years old, with the majority of the respondents in their thirties and forties.

The bulk of the data were generated using unstructured group interviews with several members of each SHG. These interviews were free-flowing though followed several themes: participants were allowed to discuss what they wished without interruption. This method worked particularly well, as interesting new points were raised by each group, and with careful steering of the conversation, each group was brought back to the same topics. These interviews were conducted in Malayalam, and interpreted. Handwritten notes were taken and later transcribed.

These data were supplemented with individual interviews with group members, PRA [Participatory Rural Appraisal (Chambers, 1994)] with sections of the SHGs and participant observation. Alongside this micro-level data, meso- and macro-level data were generated from interviews with members of the Corporation (the body in charge of Kudumbashree in urban areas), the Deputy Development Commissioner for the scheme, the Director of Kudumbashree, and the man hailed as the architect of Kudumbashree. These interviews lasted for between 1 and 2h and were predominantly conducted in English.

At each stage of the research process it was important to remain aware of the impact of the researcher's presence on the data generated (Chacko, 2004; Cloke et al., 2004). Despite being informed otherwise, it was clear that some SHGs thought that their participation in the research would assist their community and thus detailed all the negative aspects of life, only mentioning the new water pipes, electricity cables and other benefits that had been gained when pushed. This highlights the issue of uneven power relations between the researcher and the 'researched' (Katz, 1994), which Howard equates with 'the relationship between colonizer and colonized' (Howard, 1994: 20). By using participatory methods, it was hoped that this inequality would be reduced; it would however be unreasonable to state that it had disappeared all together.

The triangulation of methods as discussed above has enhanced the quality and validity of the data generated. Despite the scope of this study, the range of SHGs investigated is sufficient to maintain that these results would be corroborated by a similar study in a different region of Kerala.

The following section draws on this primary research to highlight the importance of effective planning and organization to the successful development of small-scale tourism-related enterprises.

Kudumbashree Structure

The clear hierarchical system by which the Kudumbashree scheme is organized is crucial to its success. Fig. 13.3 outlines the various groups involved at three levels; grass roots, ward, and local self-government. The linking from grass roots to local government level is an important part of the Kudumbashree's success in raising general awareness and publicizing their existence around the state. Indeed, unlike some other grass roots initiatives, the connection the Kudumbashree has with local government has given the scheme a crucial legitimization within the rest of the community. Moreover, this system allows, theoretically, for individual members of a Kudumbashree group to progress to the level of the Community Development Society (CDS), where they would have the opportunity to shape future development and mix with government officials and representatives from other schemes. The possibility of this achievement is empowering in itself. For the first time, poor women are being shown a clear pathway along which they might progress. This system has given some individuals an impetus to work hard and succeed at the grass roots level, thus ensuring the successful running of their group. The presidents and secretaries of the groups that were the focus of this research had a clear sense of their position within the hierarchy; not that they were at the bottom, but that they were at a stage of a development process that might see them as Area Development Society (ADS) or even CDS members. Whilst there will, of course, never be as many 'senior' spots as there are those willing to fill them, this structure has given those involved an important sense of the possibility of achieving something that these women have never previously had the chance to even hope for. In providing a format in which aspirations might develop, the Kudumbashree has indeed empowered the women involved, opening their minds to possibilities of a working life beyond the village confines. It is important to note, however, that despite its empowering potential, within this highly organized structure key decisions remain under the control of several prominent figures within the organizing bodies. Whilst these are undoubtedly made following local consultation, they may not fully appreciate the realities of the everyday lives of the women involved. For example, the promotion of certain enterprises, such as palm oil production, has perhaps more to do with the wider economic situation, than with the practicalities of production in a certain area, which may be problematical.

In 2005 several women who were Kudumbashree members were elected to local government in the civic elections (*Indian Express*, 13 September 2005). This was hailed as an ultimate success for the scheme, as through their groups the women had been able to take part in important capacity building and team management activities that had paved the way for their move into politics. The scheme's director hailed this as their fundamental goal; that economic and social empowerment might lead to political empowerment (T.K. Jose. Interview June 2005). Interestingly, once elected, these women were asked to leave their positions within the ADS and CDS as the Kudumbashree Mission is adamant in its exclusion of politics from the daily functioning of the scheme.

The degree of monitoring of each group's activities and the availability of advice are other key features of the scheme's success. Whilst there is a sense of
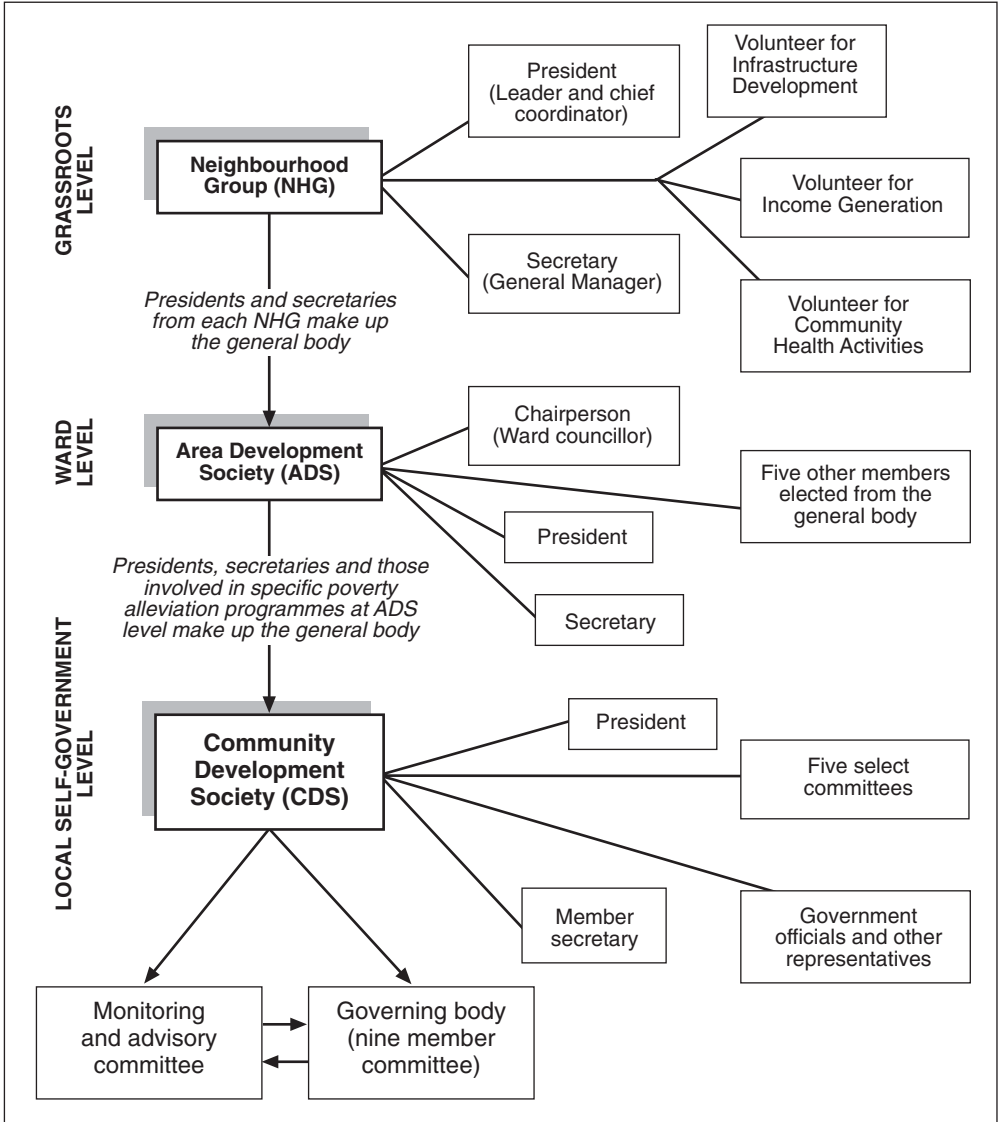
Fig. 13.3. The three-tiered structure of Kudumbashree, indicating the various roles available to members at each level.

group ownership and camaraderie within the scheme, members know that at each stage there is a senior position from which help can be sought. The meetings held on a two-weekly basis with the other Kudumbashree groups [at the Neighbourhood Group (NHG) level] are an important forum for the women to swap ideas and experiences. This type of interaction is also of great importance to the empowering potential of the scheme. Whilst the individual groups contain between 15 and 40 women from one immediate community, the

mixing of groups at these meetings is a vital method for broadening the horizons of individual members. Though those in the other groups are members of a neighbouring community, and thus have a similar background and life experiences, by making friends with women from outside their immediate community, some women spoke of the freedom this allowed them in their ability to discuss certain matters which might be unthinkable for discussion within their own group. This is an extremely important step towards women's liberation and empowerment; the new social networks that are opened up and consolidated enable individual women to develop a degree of independence from their immediate community, a factor that is just as significant to the empowerment process as gaining independence from men.

Poverty Indicators

The Kudumbashree scheme has devised a set of innovative poverty indicators with which to identify those most at risk. Disheartened with the rigid World Bank definition of poverty as less than US$1 per day, the scheme's instigators sought to create a system whereby actual needs replaced arbitrary monetary values. Moreover, by reducing the reliance on income as a measurement, the scheme was able to create a set of indicators that could be used by the local community to identify those eligible for the group. The system is comprised of nine identifiable features of poverty, a household that consists of any four of these features is considered to be in 'absolute poverty', and thus a female in that household may join her local Kudumbashree group (see Fig. 13.4). The parameters used are easily understood by all, creating a clear basis upon which to define households. There are 126 possible combinations of these features that would indicate a poor household. Moreover, by looking at the number of features each household has, a simple comparison can be made by the scheme's organizers. Not only can whole areas be easily compared, identifying those in most need of assistance, but by identifying individual households with eight or nine of these factors, who are considered to be most 'at risk', immediate affirmative action can be taken. Indeed, by rejecting a purely monetary indicator of poverty and using tangible parameters, obvious possible corrective steps are suggested.

This research found that not all women that were part of the group were sufficiently below the poverty line (BPL) as defined by the scheme. The author came across households with luxury items, which would not have been out of place in a smart London flat, in well built houses, situated next to poorly constructed breeze-bloc structures with little or no furniture. It was found that often, the more wealthy members of a group had been the ones responsible for bringing the scheme to their village, seeing the benefit for other local women. They benefited from the group solidarity given by the Kudumbashree group, even if they did not rely on income from the scheme. They were key players in the setting up of particular projects and enjoyed the fact that they could spend their time working in this way. Their participation in a scheme which is ultimately aimed at BPL women highlighted how the socialist ethics of Kerala's Communist Party have gathered popular support. The issue of the impact this disparity of
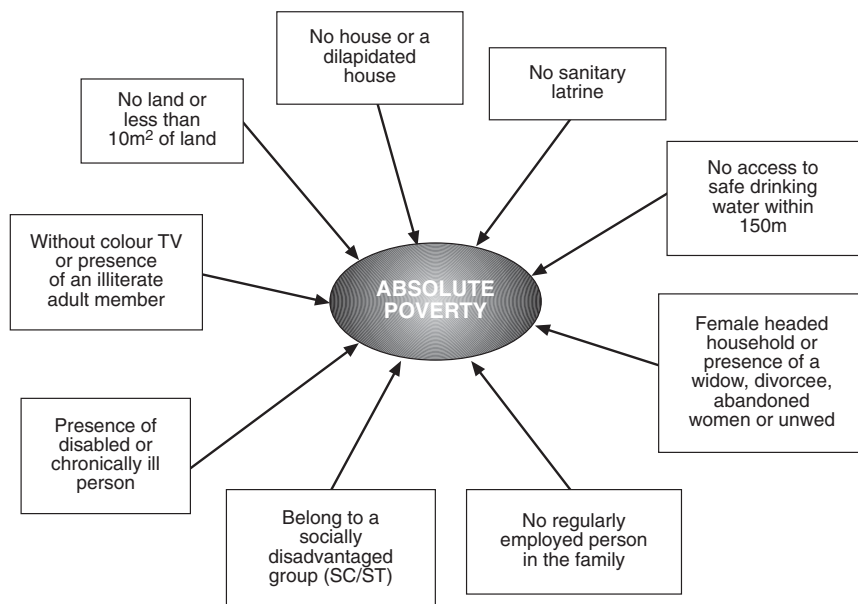
Fig. 13.4. The nine poverty indicators developed by Kudumbashree. A household that has any four of these factors is considered to be BPL and, thus, eligible for the scheme.

wealth had on group dynamics was raised. Despite an awareness of the unlikelihood of receiving a negative discussion of a woman in a higher societal position, the author found a general feeling of gratitude among the poorer group members towards those who had instigated the project and did a lot of the organization and paperwork, which would be both difficult and time consuming for those women with other jobs. This is not to say that these 'above the poverty line' members occupied all the top positions within the groups, as in many cases they took a lesser role, but that their help, and often higher education and contacts, were an important part of the functioning of the group. Despite this apparent harmony within groups, data generated through observations of weekly group meetings of several SHGs highlighted the unequal power structures that exist within each group. However, the domination of meetings and certain decision making processes by some members, and relative submission of others, appeared to be due to the presence of an outspoken individual, or individuals, rather than to correlate with socio-economic status.

Kudumbashree and Tourism

In terms of tourism, Keralan women have been seen as either pineapple and mango sellers on Kovalam beach, or associated with the darker side of tourism in that area, working within the sex trade. Whilst those who have the capital have been able to open their homes to tourists, running successful homestay businesses, few women are employed as front-of-house staff in the larger hotels. Though

housekeeping jobs are available, these are often based around inflexible hours and are not suitable for women with significant domestic responsibilities (Levy and Lerch, 1991). It is the flexibility offered by many of the Kudumbashree enterprises that is key to their success. Work on products for sale, such as handicrafts, can be done in the afternoons, so utilizing women's 'free' time. Far from complaining about a 'double burden' as is so often highlighted in the western development literature concerned with female employment (Momsen, 1991), all of the respondents in the Kudumbashree groups discussed their enjoyment at having a more challenging occupation than purely the drudgery of housework. Indeed, some groups suggested that they would like to further develop their enterprises, and discussed with great pleasure their time spent working thus far. One group pointed to their enjoyment in the time spent participating in this research project as an indication of the amount of free time they had available.

Kudumbashree groups have developed enterprises in a range of tourism-related activities. One of the most popular schemes has been the development of manufacturing units producing handicrafts for sale either directly to tourists, or to local 'trinket' vendors. The products made by the Kudumbashree for this purpose are numerous. The manufacture of various shapes and sizes of bowl, vase, cups and cardholders from coconut shells has, in several cases, proved to be a successful business enterprise. Not only is the scheme environmentally friendly, in that it re-uses what is essentially a waste product, but those involved in the groups expressed great satisfaction at their capacity to use their own imagination to design and make these items. Such products have been well received by both domestic and international tourists; the sale of large quantities of bowls to homestay businesses in the area has pointed to the possibilities of tourism as a market in which to develop. The tools needed to cut, file, glue and gloss the shells are purchased using money from loans provided by the government and private banks who offer favourable interest rates to Kudumbashree groups.

As discussed above, domestic tourists dominate Kerala's tourism industry. This has impacted on the type of activities in which the Kudumbashree can develop small enterprises. The tastes and demands of domestic tourists are significantly different from their foreign counterparts. Whilst many northern Indians visiting Kerala are extremely affluent and provide an important market for the many upmarket tourism developments in the state, the majority are less wealthy, visiting Kerala on religious pilgrimages and during festival seasons. These tourists are the main market for many of the Kudumbashree groups' products, such as soaps, stuffed toy animals, handicrafts and local culinary delicacies. Whilst there are undoubtedly foreign tourists who also purchase these products, they are not currently widely available in shops in tourist areas and so may not reach this market. Instead they are sold in towns and villages along the routes used by pilgrims, thus targeting the domestic market. However, in Kovalam, one of Kerala's most popular beach destinations, a soap making unit was set up by one of the Kudumbashree groups targeting the large number of foreign tourists in the area. The soaps were manufactured and packaged in intricately designed boxes and sold to both international and domestic tourists. In the same area another group had started a silk sarong dying enterprise. Whilst this type of item is common in many tourist destinations in the Third World,

those involved in the group discussed their positive experiences when tourists were told that the women who had made the sarongs were part of a community development project. This factor seemed to persuade the 'ethical' tourist in Kovalam to purchase goods from various Kudumbashree groups, despite their widespread availability in tourist shops in the area.

A move into traditionally male-dominated occupations suggests a further success of the scheme. One important development, and a key aim of the scheme, has been to aid groups to build houses for their members without a 'pukka' house. The building is carried out by the women themselves, buying materials at trade prices using loans from banks involved with the scheme. This type of development has done much to challenge traditional gender roles within the Keralan workforce. An article in the national *Indian Express* newspaper, discussing a group that had built up their own hollow brick manufacturing plant, was entitled: 'Eves break a male bastion brick by brick' (17 December 2005). (See also Arun *et al.*, (2004) for a discussion of the ability of Kudumbashree's involvement in an IT initiative to challenge traditional gender roles.) This progression into the male work arena has also been seen in tourism-related activities. One of the Keralan government's main schemes to encourage new tourists and maintain existing visitors is its 'Clean Destinations Campaign'. The government has identified cleanliness of resort areas as a key priority for the broadening of its international market. They have become acutely aware of the unsightliness of large open rubbish tips in areas frequented by tourists. Kudumbashree became involved in this initiative by developing several solid waste management units, run by local groups. The enterprises have taken loans to hire small trucks, in which they collect rubbish from the streets. This is then taken to a sorting area, where the biodegradable substances are converted to fertilizer, and sold to local farmers. Women collect rubbish from tourist accommodation providers who previously disposed of their waste in large open tips. This could be seen as degrading work, in a society where the association with low caste groups and garbage collection has had a lengthy and negative history. However, as such biases begin to fade, the movement of women into a traditionally male role should be seen as significant. Importantly, women in these groups are learning to drive the trucks they use, a significant move into an activity that remains predominantly male. What is more, the scheme has been able to create a sustainable livelihood for women, while employing an environmentally friendly technique.

Whist this move into the tourism industry by Kudumbashree groups may be rightly perceived as micro-scale, it is important that such developments are not seen as therefore insignificant. Kerala's poor women, and poor men for that matter, are being left behind as the pace of tourism development in the state dramatically increases. One must be careful, however, when reviewing women's participation in this rapidly expanding market, not to dismiss this type of small-scale involvement. It is important to fully address the sociocultural context and realities of poor people's lives when assessing such schemes. Indeed, for the individuals who have experienced an increase in their household income as a result of their participation in Kerala's tourism industry, the impact of such work on their livelihoods is highly significant.

Tourism, Kudumbashree and Empowerment

Much of the literature concerning the inferior positions held by women within the tourist industry suggests that, far from improving women's lives, tourism reaffirms existing gender divisions and leads to a greater dependence on men (see, for example, Sinclair, 1997). In particular, international tourism is criticized for enveloping women of the Third World into a global patriarchal capitalist system, within which they are no longer simply reliant on men, but on a changeable global market. Within the context of this study, however, such concerns seem less significant. Whilst not wishing to make exaggerated claims of the emancipatory possibilities of tourism, the example of the Kudumbashree's participation in tourism-related activities shows the possibilities of tourism for the development of female empowerment. Empowerment in this sense should be distinguished from western conceptions of female autonomy and a struggle against patriarchy; instead it must be viewed in the specific context of Kerala. The examples discussed below show empowerment as giving women a sense of achievement, and dignity in their ability to contribute independently from their husbands to their family's wellbeing. Whilst instances of women entering traditionally male-dominated roles can be viewed as following western ideas of female independence, the majority of the women who make up the scheme remain reliant on their husbands or fathers. What the scheme offers them is the chance to develop a new found self-respect at their accomplishments, giving them pride in their ability to learn and to develop their own businesses, and crucially gaining respect from others. The scheme has, in this way, been a great success, facilitating a change in the status of individual women, which may in the long term be able to change the standing of women in Keralan society as a whole. Moreover, the economic activity of these groups enables the women involved to contribute to Kerala's wider socio-economic development. The involvement of a scheme such as this in tourism-related activities is therefore a positive example of the possibilities of tourism development to raise the position of women within Third World societies.

Kerala is often noted as somewhat of an anomaly in much of the development literature. Whilst its industrial development has been slow, Kerala's Communist-led development programmes have enabled social development to occur in the absence of economic development (though see Drèze and Sen, 2002, for the difficulties of discussing this as the famed Kerala 'model'). This social development is evident in the education and health statistics, when compared to many other states in India. Whilst key factors such as female education, birth rates and, crucially, the sex ratio show Kerala's women to be far better off than their counterparts elsewhere in India, women's status within society remains low (Gulati *et al.*, 1997; Menon-Sen and Shiva Kumar, 2001). Despite a historically significant matrilineal system practiced by Nairs, who comprise 20% of Kerala's population (Drèze and Sen, 2002), and women's rise to senior political positions in Kerala, as in other parts of India, the standing of ordinary women has not greatly improved (Forbes, 1999). Kantor (2003) and Kabeer (1999) have argued that, within the context of South Asia, there is not a linear progression from economic 'empowerment' to sociocultural 'empowerment'. (See Heerah (2005) for a discussion on how the concept of empowerment has been translated into

development policy in India.) What remains to be seen is how Kerala will transform its positive social development figures into female social empowerment. Whilst the former has been achieved by innovative local governance, the latter relies on a fundamental change of cultural attitudes. One of the sub-themes investigated during this research concerned the spaces inhabited by the women of several Kudumbashree groups. The lack of women visible in village shopping areas and along roads in the countryside led the author to develop a participatory method by which several women from one group discussed and mapped the spaces that made up their lives. The extremely small physical zones in which these women existed highlighted the importance of the Kudumbashree as a means by which they could travel beyond their own village and on occasion make trips to the city. This may seem like a small feat, it was, however, highly significant to the women involved who were acutely aware of the restrictions placed on them.

In the case of the Kudumbashree, the importance of the group formation and collectivized nature of the scheme must be highlighted. Indeed, it is the formation of the group, which acts as a support network, that has had a greater influence on the social and psychological empowerment of its members than the generation of income as part of the scheme. This research found women who were elated at their ability to report crime to the police, independent of their men folk. In one case, with the help of her group, one woman had felt able to report rape to the police. She told the author that merely telling the police that she was a part of the Kudumbashree had made them listen to her allegation and take affirmative action on her behalf. In a case of domestic violence, one woman had discussed her husband's actions with her Kudumbashree group who had then sent some of the key members to speak to him, using the threat of telling the police to make him stop. These are real examples of positive empowerment, giving women the ability to enter wider social spheres and to take steps that enable them to stand up for themselves within a male dominated society. These types of advance are vitally important to individuals and to the development of a more equitable society as a whole.

In this sense, membership of the Kudumbashree is of greater significance as a self-help group, rather than as a money-generating scheme. Despite this, many women spoke of their satisfaction of their achievements in developing their own businesses. Certain group members had identified markets for products and gone through the process of applying for loans to develop small enterprises. Whilst there were also many enterprises that were instigated by the Kudumbashree officials, those women who had identified their strengths in handicraft making, for example, had gained a sense of achievement from their enterprises. This was of particular importance when the education level of the women was taken into account. Kerala is known globally for its significant achievements in education, particularly for its inclusion of the female population. This achievement, however, has not been consistently translated into female participation in the labour force. Indeed, many of the women at the centre of this study were found to have been educated to high school level, yet had never held a job. Whilst unemployment rates are a factor in this disparity, sociocultural issues are of greater significance. When questioned as to why they had not worked, despite expressing a keen desire to do so, concerns with child rearing and displeasure from their husband's family were raised.[2] Many women,

however, discussed the problems of accessing particular employment sectors. The further education needed to gain employment in jobs that would be both financially and culturally desirable was not open to some who stated that while their parents would spend money on their brother's education, they would have to take into account the cost of their daughter's dowry when reviewing their educational development. There was also a view that this was an acceptable situation, since the women would inevitably be supported by their husbands. Within this context, the Kudumbashree scheme has been particularly successful in its ability to provide for flexible small-scale employment opportunities that either do not require further education, or provide training as part of the initiative. Moreover, the ability of the Kudumbashree to allow their members to develop their own enterprises, has given the women a sense of ownership and achievement often lacking from many centrally controlled development projects.

Many studies of female employment have found women to be dependent on men for their initial start up and support for their businesses (see D'Cruz, 2003). Whilst the Kudumbashree scheme removes this dependence, the women are reliant on male input for the money needed for weekly payments. This is one significant problem with the scheme, as with no money of their own the women will only be able to take part in the group with the approval of their husbands or fathers. Though many men saw the opportunity for their female family members to make money for the household as positive, the author found examples of women who were forced to leave a group when her husband felt she was out of their home too often.

The debate as to the significance of access and control over resources in relation to empowerment is key here (Kabeer, 1999). Whilst individual earnings may be treated as belonging to the household and therefore the argument as to who has the control over these resources arises, one of the key aspects of the Kudumbashree is the channelling of earnings back into the group, allowing further businesses to be developed and spending to be negotiated among the group. Funds are then placed into a communal bank account, from which money can be withdrawn for specific needs discussed among the group. For example, imminent weddings were given contributions, as were women who needed assistance in financing books and clothes for their children at the start of the school term. Whilst it could be argued that the control over resources within these groups will inevitably not be perfectly equitable, by removing this capital from individual women, the control of husbands over these funds is lessened. In terms of empowerment, the group as an entity is empowered, as they have control over resources. Whether this has any significant effect on intra-household decision making, as is held by many to be the key to female empowerment, would be an extremely interesting area for further research.

Whilst micro-credit and self-help schemes have been implemented across the Third World, the Kudumbashree scheme has been designed and tested in Kerala to fit the specific context of development within the state. Importantly, the scheme has been integrated into government, holding an important role within the People's Planning Process, initiated by the Keralan Communist Party. Within this framework it aims to achieve more, and reach a wider audience than any project implemented by an NGO. It has as its central aim wider social change leading to the empowerment of women. Women's involvement in tourism, as in the majority of industries in Kerala, is small-scale. This has more to do with the sociocultural

position of women in Kerala as a whole, than to do with the tourism industry itself. Indeed, the data discussed here indicate that this type of involvement in tourism, that which does not attempt to actively contest gender inequality in the Keralan industry, but provides women with what, for many, is their first independent employment, is a crucial step, albeit at a passive pace, towards creating a space in which women's subordinate role within society can be debated and addressed. This was highlighted by the man hailed as the architect of Kudumbashree, Thomas Isaac, who appreciates that the use of a micro-credit scheme and the employment of women through the scheme will not necessarily lead to any great change in gender relations (Interview June 2005). Instead, he argues that the functioning of the group itself will enlarge the capacities of the women involved. Whilst he believes that 'true empowerment', in terms of fostering an understanding in the women of the degree of discrimination that they are subject to within Keralan society, will not be achieved through this small-scale work, he maintains that the group activity of so many women across the state will inevitably lead to a collective analysis of their status within society.

Despite the scheme's connections to the Communist Party, it was not intended to be politicized. It does, however, feature greatly in Thomas Isaacs' call for greater decentralization, through which he believes issues of women's and men's gender and class inequalities might be redressed (Thomas Isaac and Franke, 2001; see also Devika, 2005). The recent Keralan state elections (May 2006) saw the Communist Party regain power, and Thomas Isaac instated as Finance Minister. It will be interesting to see how the Kudumbashree develops in the next few years, and whether his final vision of its spread to all women in Kerala, regardless of financial status, might be realized.

Conclusions

The benefits of tourism as gained through the Kudumbashree are benefits not just for women, but for households and communities. The idea that employment in tourism should in someway be able to redress inequality in a society steeped in gendered stratifications seems to be far fetched. Such claims seem to imply that employment of women in another sector might be able to radically change the position of women. The involvement of women in tourism in this example has enabled communities to develop their standard of living, providing valuable income to be spent on women, men and children. The degree of 'empowerment' felt by the women in the Kudumbashree is largely due to the solidarity of the group, giving them a forum in which to discuss their concerns and wishes. The generation of income, while welcome, was not viewed as a route to empowerment, the women instead appreciated the scheme as a way to improve the lot of their family and community, rather than a means of gaining greater autonomy. In doing so, the scheme has enabled the women involved to develop a sense of self-worth and pride in their achievements. In this way, tourism must be viewed as just another sector of the economy in which female participation is possible. It should be seen as important, however, if predictions for its growth are to be believed. Moreover, the negative perception of women's involvement in

tourism in Kerala has in some way begun to lessen as the fame of the Kudumbashree scheme has legitimized women's activity in this sector. Whilst Kantor (2003) argues that access to economic resources does not challenge societal norms or sociocultural constructions of gender, this chapter has shown how women can be empowered by the ability to create their own income-generating schemes, giving them dignity and self-worth and improving their status within communities.

Through a scheme such as the Kudumbashree, tourism can indeed make a positive impact on the lives of women. It is, in this sense, merely another sector of economic development, in which micro-enterprises can develop and succeed. As the tourism industry grows in Kerala a wider market will become accessible, allowing more Kudumbashree groups to become involved, generating valuable income.

An example of the negative impact of tourism on the livelihoods of Third World women is given by ActionAid (2003) in their discussion of the impacts of tourism development on Zanzibar. What differs greatly in Zanzibar's case is the type of development that has been allowed to go ahead. By liberalizing the island's economy, in line with structural adjustment policies, private investment has been given a carte blanche to expand as it pleases. Little attention has been paid to the livelihoods of local people, who are passed over for employment in these new tourism enterprises in favour of foreign workers and those from the Tanzanian mainland. Existing gender roles are adhered to, preventing local women from competing for jobs with local men. This type of tourist development, unchecked by the government, is thus reaffirming traditional gender stereotypes.

The form of tourism development that has been allowed and encouraged by Kerala's government is very different; tourist growth has not taken place at the expense of the local population. Moreover, schemes such as the Kudumbashree enable local people to actively participate in tourism with the backing of the state. It would be wrong, therefore, to suggest that women's participation in tourism in this way could be easily replicated across the Third World. Instead, the examples of positive participation given above should be seen as an illustration of effective government action aimed directly at improving the livelihoods of the poor. Tourism is an ever-growing economic sector in Kerala, and as such is a valuable market that has been made accessible to women living in poverty through the work of the Kudumbashree.

Endnotes

² Where, as their counterparts in the north of India remain living predominantly in large extended families, Keralan women now live in nuclear families (Jeffrey, 1992). Whilst this may be seen as an important societal change that has come about as Keralan women become better educated, it means that there are less family upon which they can rely for child care while working. The Kudumbashree has successfully taken this into account by allowing women to dictate their own working hours.

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14 Actors or Victims? Actor-oriented Perspectives on New Forms of Tourism[1]

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Introduction: Some Impressions on Tourism in Northern Laos

Antoine, a 26-year-old student from France, is travelling through the northern regions of Laos. In Muang Sing, a small district capital in Laos (cases from Neudorfer, 2007), he meets Ila, an Akha woman living in a village 5 km away from Muang Sing who sells handicrafts to tourists. Antoine becomes her family's guest for a couple of days. He considers himself lucky to have the opportunity to look behind the scenes of ordinary tourism settings in Muang Sing. He takes part in village festivities, experiences everyday life in the Akha village and uses the opportunity to smoke opium, even though he knows that this is illegal. As Ila's family is poor, he reciprocates her hospitality by offering money and buying food and daily needs. Ila travels each morning to Muang Sing in order to sell her self-made bracelets, bags, cloths and, sometimes, opium to tourists. She and other women of her village are dependent on this form of income, and have developed techniques and strategies in order to dispose of their souvenirs. Seen from a tourist's perspective, these rather persistent strategies are a source of embarrassment, as they consist of following the tourists in the streets and the restaurants. Most tourists visiting Muang Sing do not feel comfortable with this kind of encounter and describe the behaviour of the Akha women as harassment. Local, as well as national, tourism authorities are concerned that the Akha women are thus harming Muang Sing's reputation as an attractive tourism destination.

Since 2004, tourists interested in ethnic minorities can take part in guided trekking tours to more remote Akha villages, organized and controlled by national tourism authorities. Tourists like Megan, a student from the USA, choose this form of community-based tourism, because they feel it is a more culturally sensitive and sustainable way of meeting villagers. Megan has already heard about ethnic minorities whose culture has been destroyed by tourism and

hopes that guided tours can prevent her from having a negative impact on the visited communities. The guides accompanying tourists to the Akha villages follow a special training on community-based tourism, initiated by foreign donor agencies wanting to develop sustainable tourism forms in Laos. Mapah, the chief of one of the visited Akha villages, has also heard about concepts like sustainability, protection of local cultures and ecology, mostly from the guides. But he has also heard about big hotels and tries to convince the authorities to build a bigger road, connecting Muang Sing to his remote village in the mountains. Then, many more tourists would come and buy souvenirs and food in the village. Mapah has his own ideas about how his village should be involved in tourism and often quarrels with the guides, especially when it comes to the distribution of income.

These are only some very limited and fragmentary impressions from Muang Sing, a mountainous Laotian region[2] that got to know tourism for the first time in the middle of the 1990s, after Laos opened its doors to international tourism. There have been claims from tourists, journalists and scientists, that Muang Sing and its people have changed a lot through tourism. Many different actors, be it local guides, Laotian functionaries, consultants of international donor agencies, tourism agents or members of ethnic minorities, try to influence tourism development in one way or another, thus getting involved in a complex process of change.

From a scientific point of view, this process is difficult to seize as a whole. From an anthropological view, it is this whole which is interesting and, therefore, the elementary anthropology question 'What the hell is going on here?' (Rottenburg, 1997: 1) should be raised.

Social sciences make different contributions in the research of tourism, analysing a range of different aspects. In the following section, I want to raise the question of what cultural anthropology has offered to the field of tourism research in order to approach tourism as a whole, from a theoretical as well as a methodological angle.

Tourism Anthropology: an Overview

Cultural and social anthropologists have contributed to the complex and multidisciplinary field of tourism science since the 1970s. Jafari (2001: 35) sees anthropology's contribution to this field in analysing the relationship between tourists and their hosts. In fact, only a few works of tourism anthropologists deal with these relationships, they rather concentrate either on tourists and their motivations or on hosting societies or communities and impacts they experience through tourism development. One of only a few exceptions to this is Robinson's (1998) work on cultural conflicts, where he analyses different levels of interaction between actors involved in local tourism. He suggests a model of tourism conflicts, where the different expectations and needs of actors are taken into account.

There are reasons for anthropologists to focus either on tourists or on locals. First anthropological accounts of tourism were the product of anthropologist's

confrontation with tourists. Anthropologists were rather confused by the emergence of curious representatives of their home culture within a field they considered as 'theirs'– even more so when obviously the intruders were, like anthropologists, equipped with cameras, books, and eager to discover unknown and exotic cultures. But anthropologists regarded themselves as professionals and tried very hard to distance themselves from the naive and embarrassing tourists. As Lacy and Douglass point out:

> It is no coincidence that the 'native' and the anthropologist – both seeking *the real* through observation of authentic sites and performances – deny being tourists. Rather, *being* native ought to confer privileged anthropological insight, while the anthropologist's understanding is presumed to derive from some degree of *becoming* native. In either event, there is truth claim predicated upon cultural sensitivity and depth of knowledge inaccessible to the mere tourist. Both the native and the anthropologist, then, may perpetuate a static view of *the* authentic culture (Lacy and Douglass, 2002: 6).[3]

This discomfort towards tourists seems to have spread out over the academic occupation with tourism. Anthropologists positioned themselves in opposition to tourists, describing the latter as imperialists (Nash, 1989), neo-colonialists (Crick, 1989), and refugees from industrialized, modern societies (also see Schlehe, 2003).

There is another striking aspect, which becomes obvious when looking into the history of tourism anthropology. It has already been mentioned that researchers tended to concentrate not on tourism per se, but divided the field into the research areas 'tourists' and 'hosts'. There is not only a division in the focus of the research, but also in the approach and in the intention of the studies.

The tourist scholars were mostly interested in theorizing tourism and the tourist's motivations. They applied anthropological concepts like ritual, play and pilgrimage to understand the behaviour of tourists and concentrated on the development of theoretical frameworks for tourism. The inspiration for these endeavours came from sociology and religious studies. The tourist's behaviour was interpreted in analogy to religiously motivated behaviour; parallels were seen in the form of travelling and rituals.[4] MacCannell, too, interprets tourism as a ritual 'performed to the differentiations of modern complex societies' (MacCannell, 1976: 13). In his influential book 'The Tourist' (1976), he concentrates on the tourist's quest for authenticity. Regarding the case examples of tourism in Muang Sing, Antoine's and Megan's search for authentic indigenous lifestyle can, according to MacCannell, be analysed as a reaction to modern everyday life in their own western superficial society, which 'lacks' authenticity and naturalness.

John Urry went further with his work on 'The Tourist Gaze' (Urry, 1990): he was also interested in tourists' motivations and behaviour, and especially in the way that tourist sites and tourist places are created or constructed through the 'tourist gaze'. All these overly theoretical works had much influence on the studies of tourism, but what they lack, especially from an anthropological perspective, is empirical substance.

The host scholars (and this is especially true for the first anthropological works on tourism), on the contrary, were missing an elaborated, common

theoretical framework, but had rich empirical material as a base. What the host scholars mostly have in common is the question of tourism's impact on the culture and society of the host communities (Stronza, 2001: 263). Referring again to the examples of Muang Sing, the host scholars would be interested in the situation of the Akha villagers and the citizens of Muang Sing, and especially in cultural and social changes going hand in hand with tourism development. Here again, different tendencies are discernable. Tourism anthropologists dealing with the hosts try either to defend tourism and to focus on what they regard as positive impacts (McKean, 1989, as an example), or they take a sceptical stance towards tourism which is often linked to a critical position towards western societies (*see* Van den Berghe, 1980; Euler, 1989). The different contributions in Valene Smith's 'Hosts and Guests' (1989) reflect and discuss these two directions very well. The critical tourism anthropology turned its attention to tourism's impacts on regions of the Majority World, and local communities were described as victims of international tourism development, helpless when it comes to defend their own culture and traditions against hordes of invading tourists. Lacy and Douglass (2002) criticize this position so prevalent in the beginnings of tourism anthropology and still detectable today:

> Despite lessons from postmodernism about the dangers of reification and essentialization of an Other, much of anthropology persists in the notion that pre-capitalist, pre-global, unMcDonaldized cultures must be protected against the sullying influences of modern capitalist enterprise, and particularly its tourist guise/gaze (Lacy and Douglass, 2002: 6).

More recent works dealing with tourism development in the Majority World and taking up the reflections of the critical tourism anthropology also centre case studies. Rather than trying to build up a theoretical framework for tourism anthropology, they draw on theories of ethnicity, conflict research, and models of intercultural communication or nation building. Tourism anthropology did not only have a look at the local level, but started to consider political backgrounds of the regions they studied. Hitchcock (1998) and Adams (1998), for example, asked how tourism development in Indonesia was related to processes of nation building and was used in order to restore national and ethnic identity. Ethnic minorities, like the Toraja, used their popularity for tourists in order to redefine their position in the Indonesian national hierarchy. Being a tourist attraction seemed to be a very good argument when it came to justify tradition and religion not consistent with the state philosophy. This is especially true, when ethnic and cultural tourism becomes an important economic sector, as was and is the case for Indonesia.

Based on elaborated case studies, the critical tourism anthropology made an effort to show positive as well as negative impacts of tourism development and indirectly raised the question of culturally sensitive tourism. By this, tourism anthropologists influenced the debate about new, sustainable forms of tourism and even made suggestions for improvements, which were directed to the tourism industry as well as to tourists (De Kadt, 1992; Pearce, 1992; Smith and Eadington, 1992; Robinson, 1998).

To summarize, tourism anthropology over a long period was not so much interested in a holistic understanding of the phenomenon tourism, but rather

tried to legitimize or criticize this peculiar and very present form of cultural encounter. It is surprising that the comprehensive and holistic approach, which cultural anthropology occupies, does hardly come into its own in the scientific tourism debate.

Tourism as System

The fact that critical tourism anthropologists tended to take sides, prompted Jafar Jafari and others to suggest a more theory-based direction, where tourism is analysed as a system.

> […] if tourism is taken as a *whole* or a *system* – for an understanding of its underlying structures and functions – this would contribute to the formation of knowledge in this field. In turn, this would aid in further development of theoretical constructs on a phenomenon now evolved into a global institution and on a business turned into a mega-industry. […] This all is meant to contribute to a *holistic* treatment of tourism – not just its *impacts* or *forms*. The main goal is the *formation of a scientific body of knowledge on tourism* (Jafari, 2001: 31f).

Earlier, Nash, who is probably one of the most influential representatives of tourism anthropology, was looking for a definition of tourism, which would not end up in a dead-end street of terminologies and was broad enough for several options. He wanted the term to cover international and national as well as local, socialist as well as capitalist, modern as well as pre-industrial forms of tourism. He therefore sees tourism as a form of leisure linked to travel, and the tourist as a travelling person free from social and cultural obligations (Nash, 1981: 462). Smith and Brent argue similarly when they understand tourism as a universal of culture, which can be found in different forms in every society (Smith and Brent, 2001: 5). Building on this basic principle, they worked out one of the best-known anthropological tourism definitions:

> All forms of tourism – international, domestic, business related, pilgrimage, or family visits – require participants to have three essential elements, best expressed as an equation: tourism = leisure time + discretionary income + positive social sanctions (Smith and Brent, 2001: 17).

This paves the way for a neutral approach to tourism and makes comparative methods possible. For Nash, defining tourism as a universal phenomenon is the key to making different processes in tourism visible and understandable. This 'touristic process' (Nash, 1981: 462), as he calls it, has its origin in the generation of tourists in their home societies and goes on with their travelling and the encounter with local people, their 'hosts'. This intercultural encounter is characterized by the 'give-and-take' between the tourists and their hosts, and it affects all the actors involved directly and indirectly in this touristic process. He goes further by suggesting, that ' … this touristic process may evolve into a *touristic system* which itself can be embedded in some broader social context' (Nash, 1981: 462). A really anthropologically motivated approach would consider the discipline's claim for holism in order to fully understand tourism and therefore concentrate on touristic processes and systems as a whole (see Nash

and Smith, 1991: 14). Burns, too, proposes to see ' … tourism as a system or set of sub-systems' (Burns, 1999: 29), as this prevents scholars from analysing tourism isolated ' … from its political, natural, economic or social environments' (Burns, 1999: 29). Tourism as a system can be characterized as being dynamic and is influenced not only by the encountering societies, but also by suprasocietal events (Nash, 1981: 463).

The system approach gives consideration to the touristic process, and definitely is enrichment for theory building in tourism anthropology. But, seen in its complexity, this approach is lacking preciseness. If tourism is defined as a universal phenomenon existing in every society, then the definition ignores unequal distributions of power and asymmetric structures existing in the international tourism industry. Nash's claim to integrate the 'tourist generating' societies while analysing local encounters of hosts and guest would only be possible if tourists, independent of their origin, can be understood as a homogenous group. Tourism anthropology has thus demonstrated from its very beginning, that the image of 'the tourist' is simply untenable (Cohen, 1974).

Debate on New Tourism

Considering the fact that tourism demonstrates different forms of appearance and impacts and is hardly possible to frame theoretically, it is no surprise that tourism anthropology split into different schools and approaches. The research on new forms of tourism in developing countries nevertheless faces two problems resulting from the actual state of the debate. First, the impacts of tourism are analysed as if they were a solely external pressure affecting static and helpless cultures (Schlehe, 2003: 36). Second, research centres focus either on tourists or on hosts and therefore provide one-sided observations of encounters, which always take place between multiple actors. The examination of only one part of the reciprocal relationship between tourists and hosts offers half-explanations, as Stronza (2001: 262) argues.

Anthropological considerations on new forms of tourism affiliate to the tourism-critical position. Belsky's (1997) and West and Carriers' (2004) studies on community-based tourism, for instance, focus on the description of negative impacts for local communities. Even if these empirical observations are not based on a theoretical framework, they do present interesting links for the development of a methodology. The case studies show that new forms of tourism like, for example, community-based tourism, hardly ever appear to be the only form of tourism existing in one region; in fact, different forms coexist and are interrelated, be it that mass tourism existed already before community-based tourism arose (see Belsky, 1997), or that other tourism forms developed parallel to it (see West and Carrier, 2004). Belsky, as well as West and Carrier, described local conflicts as consequence of community-based tourism; even if the authors do not emphasize this fact, in both cases, the conflicts were closely linked to the existence of other tourism forms. Actors, which according to community-based project planning built the original target beneficiaries, started to use the knowledge they gained through the project independently and competed with the project.

This means that new forms of tourism such as sustainable tourism cannot be analysed as a closed system, where the reason for conflicts is solely returned to insufficient project management. The interplay taking place between tourism projects and other forms of tourism and related processes have to be taken into consideration. Additionally, the question has to be raised, if local people really can be described as passive victims, or if their intervention in the course of the project leads to the conclusion that actors in tourism do have options of agency – even if they are local actors.

Tourism anthropology seems to be too much occupied by the debate about different positions and, therefore, unable to develop theoretical and analytical concepts which allow us to understand the complexity of new forms of tourism and especially the dynamics of its different encounters. Mowforth and Munt therefore propose a step back:

> Rather than commencing a study of Majority World tourism with the environmental, economic and sociocultural impacts *of* tourism (worthy though these are as research considerations in themselves), the starting point here involves seeking to understand how sociocultural, economic and political processes operate *on* and *through* tourism. In other words, it is necessary to take a step back in the analysis of tourism (Mowforth and Munt, 2003: 2).

The suggestion here is to take this 'step back' by having an actor-oriented perspective on tourism, and to understand tourism as a social field. The concept of the social field, referred to for the analysis of new forms of tourism, derives from Norman Long's notion of the social field,[5] which he developed and applied for the study of development processes in the Majority World. According to Long, I will use the term of tourism field in order to evoke the picture of an open space,

> […] an irregular landscape with ill-defined limits, composed of distributions of different elements – resources, information, technological capacities, fragments of discourse, institutional components, individuals, groups and physical structures – and where no single ordering principle frames the whole scene (Long, 2001: 57f).

This model is close to Nash and Burns' definition of tourism as a system but, as a counterpoint, it emphasizes that the limits of tourism are hard to define. The idea of tourism as a system evokes regularity and order and therefore gives the impression of an organized entity. Understanding tourism as a field also means, in contrary, to expect irregularities, as '[…] no single ordering principle frames the whole scene' (Long, 2001: 58). Therefore, the notion of tourism field is conciously wide-ranging and can be characterized by its elements, like institutions, natural resources, economic processes, ways of transport and, most important, by the actions and activities of the social actors and strategic groups interacting in this field.

These actors are supposed to have agency, which means '[…] that they possess the knowledgeability and capability to assess problematic situations and organize "appropriate" responses' (Long, 2001: 241). This perspective helps to raise the awareness for the actions and processes initiated by all the different individuals, groups, institutions and organizations interacting in a tourism field. The focus is not on what tourism does *to* people, but much more on what people

do *with* and *within* tourism, how they interact with each other, make exchanges (for example money, goods or services) or struggle for resources (like tourists, certain jobs or spaces). Different forms of tourism, like sustainable tourism projects as part of development projects and unorganized tourism, can exist side by side in such a tourism field and compete against each other.

The actor-oriented approach gives us a framework to depict and understand processes and actions taking place in tourism fields and is therefore a helpful tool to analyse new forms of tourism.[6]

This approach will be exemplified with a case study from Muang Sing, northern Laos, which has already been outlined in the introduction of this chapter. A first step consists of describing the political framework and economic background of the tourism field and, by this, to identify some typical elements of the tourism field of Muang Sing. A further step will have a close look at characteristic discourses of this field and struggles which take place between different social actors. Then I will set the focus on a group of social actors of particular importance, as they are usually described as passive victims of tourism development: Akha women. An actor-oriented perspective will show that Akha women are not as passive as it seems and that they do use different strategies in order to influence tourism processes.

A Tourism Field: Community-based Tourism in Laos

The term 'community-based tourism' is recent and, as with terms like 'ecotourism', the definition is not quite clear. In development cooperation community-based tourism (CBT) is always considered a tool that integrates the goals of the general concept of sustainable development. This means that community-based tourism has to fulfil criteria that make it economically sensible as well as socially, culturally and ecologically compatible with the communities in which it takes place. The active participation of the population in community-based tourism plays an essential role in successful improvement of living conditions. Participation is a major challenge while realising this project, because it implies effective communication in goal-setting, as well as communication of ideas and desires among the single actors (institutions, dispensers, project-team and target-group).

With regard to gender issues, the planning for community-based tourism is thought to ensure that women have equal opportunities to participate in tourism activities. Moreover, attention is driven to the prevention of sexual exploitation of women and the growth of sex work (SNV Lao PDR, 2005: 11).

The Lao National Tourism Administration (formerly National Tourism Authority of Lao PDR) considers community-based tourism as a promising way to meet international tourism demands as well as local interests (2005). Alternative tourism forms like community-based tourism or ecotourism in general play an important role in the overall national tourism strategy planning, as the country wants to become a 'world-class ecotourism destination' (National Tourism Authority of Lao PDR, 2003: 1). Actually, 20 new community-based tourism projects in Laos are developed with financing of the Asian Development

Bank (Lao National Tourism Administration, 2005). This development is remarkable considering that tourism is rather new in the Lao PDR, as the country opened its frontiers for international tourism only in the mid-1990s.

In 2002, community-based tourism was integrated into the Rural Development of Mountainous Areas (RDMA) Programme supported by the German Agency for Technical Cooperation (GTZ). The project assisted with the training of local guides in Muang Sing and organized a tourism awareness workshop for representatives of the public sector, like the District Governor's Office, the District Planning and Cooperation Office, the Lao Women's Union, and the Lao Youth Union (Lyttleton and Allcock, 2002; Lao – German Technical Cooperation, 2003; Schipani, 2003).

The aim was to achieve the economic potential of tourism through an approach that is culturally sensitive to the local ethnic mountain population. Furthermore, plans existed to support village communities in identification and expansion of income-creating measures in tourism and nature conservation (Schipani, 2003). For the Laotian context, it is of considerable importance to note that community-based tourism is a concept that was created in western societies and is closely linked to western ideas of environmental protection, equal rights and sustainable development. Additionally, community-based tourism is directed towards the western markets, from which most of the clientele come.

As a consequence, Lao people working on the implementation of community-based tourism had to meet more and/or rather different requirements than are necessary in other development projects. The abilities required encompass fluent English, a comprehensive understanding of the community-based tourism 'philosophy', and a good grasp of tourists' needs and wishes. Discussions with foreign experts reveal that even after 2 years of working in schemes like the Namha Ecotourism Project, staff and project teams did not really understand the principles of community-based tourism and had difficulties in keeping the projects running (Neudorfer, 2007).

Trekking Tourism in Muang Sing

Muang Sing is mainly visited by young backpackers. Wealthier tourists have begun to visit this area as well, but they tend not to spend as much time in Muang Sing and the surrounding areas as the younger travellers. The Tourism Information and Guide Service Office in Muang Sing (TIGS) offers different trekking tours, mostly to Akha villages. The manager of the TIGS estimates that about 40–50% of all visitors coming to Muang Sing take part in one of these organized trekking tours.

In 2003 about 25 participants coming mostly from the town of Muang Sing attended ecotourism guide training, designed by the Namha Ecotourism Project. For 3 months, the participants took courses in English, guiding principles, ecotourism, the history of Muang Sing, first aid, and the culture of specific villages and ethnic groups. Unlike in the provincial capital of Luang Namtha, where trekking is oriented towards nature as well as ethnic minorities, the main focus in Muang Sing is visits to remote Akha villages.

The Akha are an ethnic group living in the mountainous regions of south-west China (Yunnan), Myanmar, Thailand and the Lao PDR. Their language belongs to the Tibeto-Burman branch of the Sino-Tibeto linguistic family and currently only few Akha speak the national languages of their resident countries. In Muang Sing district, the Akha are the major ethnic group, forming 65% of the population. According to Schipani (2003), they number around 24,000. The Akha are considered 'backward' by the other groups in the Lao PDR (Chazée, 1999; Mansfield, 2000), and have the dubious reputation of being conservative, inflexible, very resistant to modern changes and suspicious towards foreigners. These prejudices do seem widespread and hardly facilitate interaction.

While villages from other ethnic groups, including the Tai Neua, the Hmong, and the Yao, are involved in the ecotourism programme, tourists only stay overnight in Akha villages. For this purpose, simple guesthouses have been built at the edge of the villages. The villagers received financial support from the tourism office to build these bamboo-huts and they get 10,000 Kip[7] per tourist per night. The families of the village follow a rotational system for cleaning the hut and bringing water when the tourists arrive. In January 2004 these families, referred to as 'local guides' were paid between 17,000 and 20,000 Kip each time someone visited. The fees decreased during the author's stay: in July 2004, TIGS staff reported that they had paid 10,000 Kip.

Additionally, villagers sell rice and vegetables to the tourists, and sometimes handicrafts such as the traditional 'shirts' worn by the women are on offer. However, in the villages where tourists stay overnight, there is as yet almost no production of handicrafts especially for tourism. In one village in the mountains, two or three women began to offer tourists some of their traditional clothes and small items to buy, but the women are rather unsure of how to approach the tourists.

Income from the tourism is supposed to be distributed according to the Namha Ecotourism project concept (Schipani, 2003; SNV Netherlands Development Organization, 2003). In all, villagers should receive about 26% of the fees paid by the tourists, with the provincial guides earning 29%, provincial businesses (transport and food bought in town) taking 22% and administration costs being covered by 23%. Massages given by Akha women on the trek are not included in this reckoning of fees, as tourists should pay extra for this service. The system in Muang Sing is slightly different from the Namha Ecotourism Project, the massages, for example, are already included in the fees paid by the tourists. In the office fees, money spent for local transport, taxes, administration costs and trekking permits are included.

According to the guides, this reckoning of the amount of food bought in the village is inaccurate. The figure of 21% of fees being spent on village food would mean that about 42,000 Kip per tourist was spent in the village on a 2-day trek. However, observations, and interviews with villagers, show that the guides usually bring a lot of food with them and spend a maximum of 20,000 Kip per tourist in the village. It is also clear that compared with the conceptual distribution proposed by the Namha Ecotourism Project, the guides earn much more than initially planned, whereas villagers earn less.

In point of fact, community-based tourism is not an important source of revenue for the participating villagers. In the period March 2003 to March 2004, 67 tourist groups came to the observed Akha village, bringing an estimated income for the village of 3,900,000 Kip.[8]

Men and women from the Akha villages who were interviewed on this issue said that everybody in the village would benefit from a higher number of tourists. It also became clear that villagers expect that a higher number of tourists would mean increased income through the selling of food, handicrafts, and services like massages.

There are several reasons why villagers would like to increase the numbers of tourists. Not only do they get some income through tourists who stay the night, but they also have the opportunity to sell products to them (see Fig. 14.1). This means that villagers can avoid the hard and time-consuming walk to the markets of Muang Sing or Ban Mom, where they usually sell their products. 'With the tourists, the market comes to us and we don't have to leave the village', said one of the village chiefs. Asked whether they could imagine what more visitors and a better tourism infrastructure would mean to their village, one village chief replied: 'A road and big buses with many tourists coming would be of advantage to our village. The more tourists come, the more we can sell.' He stressed, though, that he would not accept tourists who just pass his village without staying overnight. 'Tourists have to spend some time and sleep here, otherwise we can not profit from them. We need that time to sell them something.'

In general, villagers felt that the distribution of income was not just: guides were earning very much from tourists, and some of them were even keeping the money that was supposed to be spent buying food in the villages.

Fig. 14.1. Akha women selling souvenirs to tourists in Muang Sing, June 2004 (photo Michael Flacke).

The Discussion of Tourism's Impact on Local Culture

Many theoretical models suggest that tourists are most likely to be a source of conflicts. The United Nations Environment Programme (UNEP), for example, considers negative sociocultural impacts of tourism as a result of direct and indirect relations between the host communities and tourists.

> The impacts arise when tourism brings about changes in value systems and behaviour and thereby threatens indigenous identity. Furthermore, changes often occur in community structure, family relationships, collective traditional lifestyles, ceremonies and morality (UNEP IE, 1995).

Many tourists visiting Muang Sing express concern about the negative influence on local communities. Some participants felt that tourism is responsible for the cultural changes they observed in the villages, like people wearing T-shirts and jeans instead of traditional clothes, or the presence of radios, tape recorders and even video-CD and DVD players. They often wonder if it is a good idea after all to participate in a guided trekking tour to remote villages.

Akha villages, though, have always had contact with local markets and traders, buying goods and also selling products like fruit, vegetables, wild honey and so on to lowland people. It is clear that those contacts also influence the everyday life of the Akha and that cultural changes are not related to tourism only, but to a growing market economy as well.

Tourism has certain influences on the economic behaviour of local people: some Akha women from villages near Muang Sing have begun to go into town to sell handicrafts like bracelets, belts and hats to tourists. These activities depend on the tourist season: during the low-tourism period from May to June, the women prefer to work in the rice fields rather then sell handicrafts in Muang Sing – only a few of them can be seen in town. When tourism arrivals rise, however, the number of saleswomen grows. Some women (particularly the older ones) travel to Luang Namtha and stay there for 2 or 3 days, because they find more tourists there. This behaviour has often been criticized as inappropriate and consumer-oriented by outsiders. Some of my western and Laotian interview partners considered the women as being spoiled by the impact of tourism and saw their activities in the field of tourism as a consequence of lost culture.

Akha women as social actors in Muang Sing's tourism field

Tourists visiting Laos become familiar with the appearance of the Akha women long before they will actually meet them personally. Pictures of traditionally dressed Akha women are present all over mainland South-east Asia: they adorn guide books, postcards, advertisements for travel and trekking agencies, coffee-table books, and posters of official tourism offices. The pictures show Akha women wearing the well-known traditional head dress, called *uceu*, ornamented with silver coins and silver buttons; a black cotton mini-skirt, a black jacket ornamented with colourful embroideries and leggings. These images often come with descriptions of the Akha as one of the few remaining traditional hill tribes living in the higher regions of the golden triangle.

Tourists, who finally arrive in the small town of Muang Sing in the north of Laos not far from the Chinese border, easily recognize the women who stand in front of the market as Akha.

But they will also get to know another image of Akha women. Here in Muang Sing, the women are street-vendors, selling small handicrafts like bracelets and bags to tourists (see Fig. 14.1). Tourists sometimes feel that the behaviour of these women is aggressive, as a survey of tourism experts shows (Schipani, 2003). In fact, these women are quite stubborn when it comes to selling their souvenirs, and few visitors to Muang Sing will leave without having been a victim of the Akha souvenir sellers, and wearing the bracelets, small bags, and other Akha items.

Female roles in community-based tourism

The project plan for community-based tourism reflects gender issues when it stresses the importance of involving women in activities of the project.

> Involving ethnic minority women as guides and managers of CBE [community-based ecotourism, CF] activities will provide employment, direct income and educational opportunities that will allow them to play a necessary role in shaping the overall development and operation of CBE in the district. Employing ethnic minority women as guides and programme staff also offers them an alternative to employment in darker side of the tourism industry (i.e commercial sex work) (Schipani, 2003: 14).

An ecotourism project team already had experience working with ethnic minority women in another project. The results were satisfying, as Schipani, one of the experts involved, noted: 'Some of the best trekking guides in neighbouring Namtha district are women' (Schipani, 2003: 14). But the situation in Muang Sing is different; here only one woman is actively engaged in the tourism project. She is working in the tourism office in Muang Sing, mainly as assistant and housekeeper, and as assistant guide on trekking tours. As a member of the ethnic Tai Lue and city resident, she has attained a rather high level of education, and some of her relatives are also working for the development agencies in Muang Sing. When the project plan spoke of employing ethnic minority women, however, it did not mean the Tai Lue, but rather those ethnic minorities who reside where tourists stay overnight, namely the Akha.

This means that gender mainstreaming is not as easy as it sounds in project plans and that, obviously, the particular conditions of the situation in Muang Sing must be taken into account.

If tourists in Muang Sing decide to join one of the treks offered by the tourism office, the contact with Akha woman in the mountain villages will be restricted. The guides who were trained by the project do not speak Akha and explain, often, that the traditional Akha woman is shy and reserved, especially towards foreigners. He will stress that Akha girls are allowed to have sexual relations with boys before marriage, which is rather unusual for South-east Asian societies. He will also explain that Akha girls are supposed to marry at a very early age and give birth to a lot of children and work hard on the rice paddies – harder than the men of Akha society. Then the guide will inform the tourists that

an Akha woman is supposed to cook for her husband and for her male relatives, serve them during the meals and eat the leftovers when the men finished. They are also supposed to give massages to tired or exhausted husbands, male relatives and their male guests. These traditional massages, which consist of pulling and stretching the limbs of arms and legs, also form a part of what the tourists can experience during their treks.

The image the tourist gets to know during his trek is thus that of a traditional society where women are oppressed by men. Tourists also learn that the Akha are a very traditional society and that gender roles have to be accepted. Community-based tourism, after all, aims at strengthening traditional lifestyle and customs in the societies visited.

When project staff or guides were asked why Akha woman would only be involved in tasks like giving massages to tourists, posing for tourist's pictures (see Fig. 14.2), cleaning the guesthouses where tourists sleep or cooking rice for them, the answer was clear. First, they explained, Akha women would be very shy and would not feel comfortable if they should have to engage more actively in relations with outsiders. Second, these same people offered, the roles the Akha women have in community-based tourism now, would correspond perfectly to their traditional role. Here again the argument that community-based tourism should protect culture and tradition and not have an impact on traditional societies arose. In fact, the suggestion that Schipani (2003) made in his project plan to engage women actively as guides and other activities was seen as an unrealistic idea, which would not correspond to the needs and wishes of Akha women in the villages.

Fig. 14.2. Community-based tourism in an Akha village, February 2004 (photo Corinne Neudorfer).

Akha women outside the project

There was another comment from my non-Akha interview partners concerning this issue which was interesting: they often suggested that Akha women were especially endangered by tourism, and that there was a living example proving this. Guides, project staff and some of the Laotian officials of the tourism department explained to me, that the women selling handicrafts in the streets of Muang Sing were a good example of the negative impacts of uncontrolled tourism. They would show no sign of shyness when addressing the tourists, and their behaviour would be rude, materialistic, capitalist and not appropriate. One German expert told me he was very concerned about those women, as they would give Muang Sing a negative image and prevent tourism development. He felt that these women were totally spoiled by tourism and should be controlled somehow. Project staff tried to convince the women to sell their souvenirs in a shop behind the market, but the women refused, which was seen as another sign of rudeness and irrationality.

None of the guides or project staff mentioned the fact that the shop they offered for the selling of souvenirs was in fact not frequently visited by tourists. One of the concerned Akha women explained that she would sell nothing in that shop and that she was far more successful when addressing the tourists directly in the streets and following them for a while. There was another reason why she would not cease addressing the tourists directly: some of them, especially the younger tourists, showed an interest in visiting the women's villages, which were located not far from Muang Sing. Others wanted to smoke opium, and they approached the women directly themselves, probably because the Akha are famous for growing poppies.

The villages where the sellers come from were settled by those coming down from the mountains into the plains of Muang Sing some 20 years ago, following the resettlement plans of the Lao government. Since then, the economy of the villages has changed. There were not enough fields in the plains for everyone to cultivate rice and corn, and no forests where the men could hunt. The water in the plains was polluted, so that the villagers also faced new diseases. The rates of addiction to opium increased, which brought even more problems to the villages. Opium addiction is a predominantly male problem in Akha society. Once a man is addicted to opium, he is unable to work in the fields or as a wage-labourer for Chinese and Laotian farmers. It is then up to his wife to feed the family and earn money to buy drugs for her husband (Cohen and Lyttleton, 2002).

Some of the women found a solution in tourism. Not only do they sell souvenirs to the tourists, they also manage to bring the foreigners with them into the villages. Tourists even can stay in the villages for a couple of days, and there are only a few rules to follow, set up by the souvenir women: the tourists have to buy food for themselves and for the family that will host them; and they have to pay for the transport of all the women. Once in the village, the women will show the tourists around, let them take pictures and then prepare food for them. Even if the women speak nearly no English or Lao, they manage to communicate with the tourists by means of hand gestures. In fact, over the years the women became quite experienced with this kind of communication, and tourists coming from the villages

often told me that the Akha had explained to them – without the use of a common spoken language – the meaning of the headdresses, religious matters and so on.

Often, the tourists are so pleased, that they propose to help the family of the souvenir women. One young French tourist, Antoine, told me that after living for 2 days with the family of one of these women, he realized that the youngest child was very sick and took him to the nearest hospital. He also bought some medicine, mosquito nets and left US$30 before finally leaving the country. The women were grateful and organized a ritual consisting of Akha and Lao elements, in order to wish Antoine good luck for his journey home.

To conclude: the souvenir sellers are women who work hard to find a way out of poverty. The way these women managed their relations with tourists, their successful creativity and their experience with tourists is remarkable. With the money they gain from tourism, they sustain their families. They even manage to earn much more than an Akha family who takes part in community-based tourism. The community-based tourism village families I surveyed earned about US$1 per household in one month. This amount was not satisfying, nor were they relying on tourism. The situation is completely different for the souvenir sellers: one woman makes between US$15 and US$50 a month with her handicrafts, and she heavily relies on tourist support.

But there is also a problematic side to their tourism activities. When the project started to work in Muang Sing, new rules arose. To host and guide tourists became illegal until the person had gone through job training to become a licensed guide. This training was (and still is!) reserved to persons coming from the city of Muang Sing who have better access to education. Also, the government became very strict concerning the consumption of opium, which is now officially illegal. But as the souvenir women need the income from tourism, they still offer tourists opium. This also means that those Akha women are engaged in a form of tourism, which is regarded as highly illegal and therefore problematic.

This surely was one of the reasons why the original project plan contained the idea to engage these women and give them guide training. Not only would the project profit from the women's experience with tourists and their knowledge about the Akha, but to work with these women also means showing them a way out of their now-illegal activities.

In Muang Sing, it is not the traditional gender role, which is repeated in community-based tourism, but a gender position, which is imagined by outsiders as being a traditional one. In fact, Akha men are equally excluded from participation in community-based tourism, as women are. But Akha men usually do not express the same eagerness to gain their living from tourism as the souvenir-selling women do.

Akha society is maybe less strict in its gender separation than many outsiders suspect. In villages like the resettled home of the souvenir sellers, where the entire economy of subsistence changes over the years and men cannot fulfil their traditional roles as hunters and farmers, Akha women do take the opportunity to get access to new resources like tourism. In this, my findings for the Akha differ from Tucker's conclusion. Community-based tourism does not enhance women's position, but tourism activities, which are running independently from development agencies and officials, do change women's roles in Akha villages.

There are several reasons why Akha women only play minor roles in community-based tourism:

1. Akha women are supposed to be shy, reserved and traditional. This image is part of the cultural experience and the product of community-based tourism and therefore should not be changed or influenced.
2. The project works a lot with this image of tradition and unspoiled societies in order to attract tourists. It is in the project's interest that the villagers do not change visibly. This is especially true for women with regard to their headdresses.
3. Akha women, who are already actively involved in tourism as vendors, can be serious competition for the guides. The guides do have access to and the knowledge about Akha society that tourists look for; the Akha women can act as brokers and create an atmosphere of authenticity at a level which outsiders cannot attain.

The concerns about cultural and social change were so strong that ethnic minority women who were already benefiting from tourism through selling souvenirs were simply excluded from sustainable tourism projects. When it comes to the realization of gender issues in tourism projects, raising these issues often results in mere lip service being paid to their incorporation into notions of sustainable tourism, or to perplexity among those discussing these issues.

The concepts of cultural conservation, intensively present in the scientific and international debate about sustainable tourism are, in this case, conflicting with the interests of ethnic minority women by limiting their involvement in such projects. Only if the question of gender equality is taken more seriously can these conflicts between global ideas and local interests, as well as possible ways to resolve them, become clear and understandable.

Conclusion

At the beginning of this chapter, an actor-oriented approach was suggested, adapting Long's notion of social actors and social fields to tourism analysis. One of the most important elements of this approach is a broad understanding of tourism and its processes as such, and not a limitation to tourism being something introduced and dominated only by tourists or the tourism industry. The actor-oriented approach demands an open and wide angle on processes and changes. It assumes that actors are capable of acting and that they are influencing the tourism field by pursuing goals, following own strategies and having conflicts with other social actors. Therefore, tourism is not what tourists do (or do to local communities), but it is a complex field characterized by different interactions and images of different actors. These actors build groups, they interact, communicate, struggle and by this they initiate a set of processes. The tourism field becomes a dynamic field, exposed to constant changes and bedded into a set of local conditions.

The actor-oriented approach and the emic and holistic approach, typical for the studies of social and cultural anthropologists, complement each other. By adding the actor-oriented perspective and further developing specific approaches and methods, tourism anthropology still can make an important contribution to the multidisciplinary fields of tourism sciences.

Endnotes

[1] Acknowledgements
   An earlier version of this chapter appeared as an article in *Tourism and Hosplitality: Planning & Development* 4, 135–147.

[2] Muang Sing is the name of the district as well as of the district's capital.

[3] Lacy and Douglass (2002: 6) see similarities between anthropologists and tourists: 'MacCannell (1976, 1992) underscores the *tourist's* search for romanticized authenticity, but we would argue that this is precisely the quest of many anthropologists as well. According to this anthropological view, the banal tourist site is the sacred field site; the tourist's casual visit the investigator's prolonged *participant* observation.'

[4] The works of Graburn and MacCannell are exemplary. Graburn understands tourism as counterpart to everyday life, as play contrary to work, and therefore as 'sacred journey' (1989). The tourist's escape from modern everyday life into a stadium of exception and non ordinary passes phases similar to those of rituals. The preparations for a journey and taking leave of friends and relatives, the intensive experience of a temporally limited journey itself, the return and reintegration in the home society – all these are elements characteristic of what van Gennep calls 'rites de passage'.

[5] Norman Long's notion of the field has been clearly influenced by the Manchester School and Bourdieu. It is rather the way of adopting it to development processes than the concept as such, which is new.

[6] A more detailed explanation of this approach can be found in Neudorfer (2007: 51–72).

[7] 1 Euro = 11,000 Kip (2004).

[8] This is a 'best-case' calculation, assuming that each tourist spends about 10,000 Kip on accommodation which goes to a village fund, 5000 Kip for a massage, 10,000 Kip on food bought in the village, and 4000 Kip buying handicrafts, which actually happens very rarely. Additionally, a local guide earns 10,000 Kip for each visit. In fact, not every tourist has a massage or buys handicrafts while the total spent for food in the village is sometimes lower than 10,000 Kip per tourist. See Neudorfer (2006).

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15 Rural Tourism in the Context of Ejidos and Community Development in Mexico[1]

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Introduction

In Mexico, tourism is an important source of income: it is the eighth most visited destination in the world. As a result, tourism is the third biggest source of foreign exchange for the country (Secretaría de Turismo, 2003; Cruz García, 2005). Additionally, domestic tourism also contributes to internal distribution of wealth within the region. Rural tourism is a relatively new concept in Mexico, and there has been an increasing interest in putting the poor at the core of tourism development (Presidencia de la República, 2004). Federal and state governments are supporting local development through policies that encourage the creation of micro enterprises linked to tourism in rural areas and have even created mechanisms or programmes to assist rural people with finance and technical advice (César Dachary, 2003).

Land Tenure Relations in Mexico – the Ejido

The term 'ejido' refers both to a form of land property and the group of people who have rights on it as a collective. Each ejido member, called an ejidatario, has their own designated plot with their rights over it, determined by the Assembly of Ejidatarios (members of the ejido). The national government also sets regulations on the use and administration of the land (Haenn, 2006).

Ejidos are intrinsically part of agrarian society in Mexico today. The formation of ejidos started after the revolution and continued until the 1980s. After the 1992 reform to the Agrarian law that affected the ejido's organization, the change has been slow and many ejidos still remain on the bases that were formed.

The ejido has its roots in land organization in pre-hispanic Mexico when, besides individual land rights, some land was exploited collectively by kinship

groups (Bartra, 1993; Editorial Sista, 2006). The conception of the modern-day ejido dates back to the early 20th century, after the Mexican Revolution. The banner of the revolution was the redistribution of land that was by then concentrated in *haciendas* in the hands of the upper classes and in *ranchos* occupied by the Mexican middle class (Esteva, 1983). The *rancheros* were smaller and situated adjacent to the *haciendas*. The expropriation and redistribution of land started almost immediately after the revolution. The ejido was chosen as the form of tenure for land distributed to settlements of peasants. Not all parts of the land in the haciendas and rancheros was expropriated; size limits were set on the ejidos in order to leave these larger units comparatively intact for the owners.

In the original concept of ejidos, land was given on usufruct terms to the individual ejido members who had the right to live from it but they were not entitled to sell, rent or mortgage their plot (Esteva, 1983; Barros Nock, 2000). In 1992 the Agrarian Law was reformed to support neoliberal policies. The most relevant feature of the reform consisted of giving ejidatarios the option of owning their individual plots of land and, thus, the ability to sell them. This right applied only to arable land and not forest. Forest that belonged to the ejido could not be distributed among its ejidatario members but had to be exploited as common property.

For various reasons that cannot be detailed in this chapter for constraints of space but are well documented (see Esteva, 1983; Walsh Sanderson, 1984; Bartra, 1993; Barros Nock, 2000), the formation of ejidos did not have the expected impact on peasant incomes. Very often, when ejidatarios received the land, they did not have the capital or the inputs to make it productive. In theory, the post revolutionary reforms sought the advantage of rural peasants. In practice, investment and credit conferred by the government benefited mostly those with private property (i.e. non-ejidos farms, see Walsh Sanderson, 1984; Barros Nock, 2000). Today most rural families complement their income with non-farm activities, the latter in some cases being the main source of income (Instituto Nacional de Estadística Geografía e Informática, 2000; 2005). It is in this context that rural tourism is envisaged by academics, governmental agencies and some rural inhabitants alike as an opportunity (Presidencia de la República, 2004).

Concerning land tenure and tourism, more than 50% of the 30 million ha of cultivatable land belong to land reform beneficiaries, i.e. ejido members (see Walsh Sanderson, 1984). According to Haenn (2006: 137) 3.5 million Mexicans are ejidatarios. If we consider an average of five members per family,[2] 17.5 million people depend at least partly on their ejido land for their living, which is 20% of the total population (2000 Population Census for Mexico). These figures show that if an initiative for rural tourism is proposed, it is highly possible that the land tenure arrangement of the site will include ejido land.

The next section links land tenure with tourism. It describes some of the complexity of land tenure relations in ejidos compared to those in private property, and how these are mostly overlooked in the conventional notions of rural tourism.

Rural Tourism

Rural tourism can be conceptualized in simple terms as tourism activities designed to take place in rural areas.[3] Since the 1980s, rural tourism has been widely researched and attention has been given to the diversification of rural livelihoods through tourism (Ashley, 2000). Within this broad scope, research has focused on the economic aspects of rural tourism (Fleischer and Felsenstein, 2000; Cattarinich, 2001; Dice, 2002; Briedenhann and Wickens, 2004), the balance between the social, economic and environmental aspects of rural tourism (Bramwell, 1990; Lane, 1993; Rátz and Puczkó, 1998; Cánoves *et al.*, 2004) and the role of communities as hosts and promoters of tourism (Countryside Commission, 1995; Verbole, 2000; Dyer *et al.*, 2003). Little attention appears to have been paid to land tenure relations and how these may shape rural tourism and its prospects.

Ashley (2000) discusses the implications of tourism for other income-earning activities such as grazing and how there could be a conflict in the use of resources. Her analysis is around the complementarity and conflict of different livelihoods but it does not examine conflicts based on land tenure as such. Vail and Hultkrantz (2000) report on their study of property rights and their effects on nature tourism in Dalarna (Sweden) and Maine (USA). Unlike the case of ejido land, in these study areas the land is privately owned, but the problems exist on rivalry of land use particularly because access to these properties has been relatively open for recreation, meaning 'access is a right or a customary entitlement'. The owners of the land use it for logging, which is in conflict with tourism (as the authors show) because some areas have to be closed – a problem when access for recreation is a right. Again, this situation is not the same as that of ejidos, but it is relevant in that it calls attention to the issue of property rights and how they affect the way tourism is perceived and shaped.

Tourism within ejidos faces the same challenges as tourism in individual property. It is subject to different laws and regulations. Tourism may also be subject to agreements between neighbours that could be somehow affected by the activity. In addition to these constraints that are common for tourism in ejido and individual property, the ejido faces other challenges. One of them is that of reaching a consensus. As a system of collective ownership, individual ejidatarios, who might want different things, must compromise to move forward. There is also the issue of revenues; the more ejidatarios there are the less income each can get and also the less opportunity each has to get fully involved. Challenges based on land tenure and property rights are overlooked because it is probably assumed that most rural tourism initiatives are set up on individual property.

The next section describes San Juan de las Huertas, a community that has had a tourism 'enterprise' since the 1970s in the Nevado de Toluca National Park. This community is an ejidal community involved in rural tourism where not all community members are ejidatarios.

The Empirical Study: Nevado de Toluca National Park and San Juan de las Huertas

Nevado de Toluca National Park

The Nevado de Toluca National Park is found in the east centre of the state of Mexico and is considered the most important water provider in the region as it is part of the Transverse Volcanic System (Sistema Volcánico Transversal). The park's central feature is a volcano with a crater divided into two. There is one lake in each of the sub-craters. The park has a surface of 54,000 ha and its territory spreads across 10 municipalities. Inside the park were 15 settlements and a total of 5585 inhabitants in 2000. Fifty-nine per cent of the park is ejido land, 29% is held as private property while only 6% is national territory (figures from the Agricultural and Hydraulic Resources Secretary, according to Instituto Nacional de Ecología, 1997; CEPANAF *et al*., n.d.: 43).

The park has different resources and therefore various vested interests. Water, land, trees, soil and fauna – the Monarch butterfly included – are just a few examples. Institutions concerned with natural resources identified that the problems of the park are agricultural and grazing area expansion, trees being cut down, fires, tree plagues, soil extraction for building, hunting and human settlement (CEPANAF *et al*., n.d.). Although there are only a few organizations involved in the management of the park, problems of coordination make them inefficient (Instituto Nacional de Ecología, 1997). In interviews with repre-sentatives of PROBOSQUE (governmental institution in charge of protecting the woods in the state of Mexico) and CEPANAF (governmental institution in charge of protecting and conserving the natural parks and the fauna of the state of Mexico), the representatives point to the main problems of this national park, the loss of woods caused by activities like farming or grazing. For this reason and the environmental importance of this national park, the institutions mentioned consider that it is vital to offer other economic/employment alternatives to the communities that have territory within the park. Tourism is considered among these alternatives.

The San Juan de las Huertas ejido is publicly identified as the ejido that has greater benefit from the tourism activity generated by this park. Its area of influence and some characteristics of the community itself are described in the following section.

San Juan de las Huertas Ejido

Representatives of San Juan de las Huertas asked for land in 1917 from the National Agrarian Commission. According to historical records, the procedure involved carrying out a census to find out how many individuals were in need of land. Males above 16 years of age, either married or single, were considered to be eligible. The next step was to explore which haciendas could provide land (haciendas within a 7 km radius from the settlement seeking land). In 1923 land was provisionally granted to San Juan de las Huertas – 150 ha taken from the

Tejalpa Hacienda. The final resolution was made in 1926 when 424 ha was given to 572 'able' males that formed the San Juan de las Huertas Ejido. The ejido was expanded in 1935 when an expansion of 1746 more hectares taken from La Huerta, Tejalpa and La Gavia haciendas was granted. A second extension was requested in 1937 but was denied on the reasons that there were no more haciendas that could be affected (information taken from the Agrarian Archive). Meanwhile, the community had grown and changed. While in 1970 56% of the working population (690 individuals) was occupied with farm-related activities, in 2000 it had reduced to 13% and 430 individuals.

According to an official document dated 23 October 1926 and kept in the Agrarian Archive, the land given to San Juan de las Huertas was woodland. It was obliged to 'keep, conserve and boost the forest vegetation existent in the given area and exploit it in common'. The product from the exploitation was to be used for the advancement of the public services in the community. This was in accordance with the Agrarian Law and remained after the latest reform of the law in 1992. Considering that the main problems of the national park are perceived by officials to be the loss of wooded areas to livelihoods like grazing and farming, the obligation of 'conserving and boosting' the forest has not been met.

Presumably, part of the land that was given back in the 1920s to the San Juan de las Huertas ejido is what today constitutes the deer park. This latter fact is unclear. The Agrarian Archive registers in its file 249 of San Juan de las Huertas various ejido/ejido and ejido/private property boundary problems. Some of these boundary problems have not been solved yet. Different versions say that the deer park belonged to San Juan de las Huertas since the land was granted (1923–35). Others say it was included in 1975 when it was given in usufruct to the ejido by the then Governor, while yet others say that it does not belong at all to the ejido but to one of the nearby haciendas. Until the boundary problems are dealt with, it is widely recognized that the deer park belongs to the San Juan de las Huertas ejido, as has been the case for about 30 years.

In San Juan de las Huertas there are 346 ejidatarios. People that live in the community and do not fall into the ejidatario category are legally called *avecinados*. If ejido membership is taken as a family asset, the number of *avecinados* is around 1797[4] counting only household heads. Whether ejido membership is taken as a family or individual asset, the issue is that the *avecinados* constitute the great majority of the population. Because the latter are not part of the ejido, they do not have a voice or vote concerning what happens to it. In the case of the deer park, the *avecinados* have been granted the right to visit without having to pay the entrance fee; further than that they do not have any other explicit right.

Deer Park (Parque de los venados)[5]

There is only one access road to the crater of the volcano. The area immediately below the volcano belongs to the ejido of the San Juan de las Huertas and visitors must pass through this area to reach the crater which is the major

attraction in the park. This area is called a deer park. The San Juan de las Huertas community itself is found in the surrounding areas of the national park.

In 1975 an agreement was signed between the San Juan de las Huertas ejido and the National Commission of Works in Natural Parks (CONOPAN) to create the deer park in the ejido (Instituto Nacional de Ecología, 1997). The deer park was created with a twofold purpose: (1) contribution to the conservation of the park and (2) creating sources of income for the community.[6] Thirty years later the deer park counts on two accommodation buildings that can jointly host some 200 people, a small food selling area for 10 people and toilets. These constructions were built in different phases mostly with governmental resources.

There is no record of the people who visit the deer park. However, a record is kept by CEPANAF of visitors to the crater in the national park. If it is assumed that people who like to visit the crater must go through the deer park then the latter records can be used to represent those who visited the deer park – even though they may have merely passed through rather than visiting the park.

The records that have been kept since 1992 show that the number of visitors was increasing every year until 1995 when it reached its peak at 54,152 visitors. From 1996 numbers have fluctuated between 27,698 (the highest in 2001) and 19,311 (the lowest in 2000). Since 2002 numbers remain between 22,000 and 24,000. These figures are important when analysing the potential of the deer park.

At the moment, people pay only an entrance fee to enter the deer park and later another fee to enter the crater area. Those who stay in the cabins also pay their accommodation but, according to the Comisariado (representatives of the ejido and managers of the deer park), this hardly ever happens. There are no activities organized by the ejidatarios for the visitors except horse-hiring and the occasional guide but not even these services are offered on a permanent basis. There are no maps of trails that the visitors could acquire to explore the park and those who have ventured to explore the park without a map have got lost. So every tourist is confined to the same places where all other tourists stay.

The following section sets out the problems that the ejido of San Juan de las Huertas faces, and continues to face, while managing the deer park. Today, the balance is in the red but some things have been gained and there is much potential for this area to develop fully.

The Challenges of Rural Tourism in the Context of Ejidos

Ejidos – a suitable structure for managing rural tourism?

A rural tourism initiative in an ejido entails that the Assembly of Ejidatarios (all members of the ejido gathered together for decision making concerning the ejido), which is the highest level of decision making in the ejido, reaches an agreement on the activity. This involves a fair number of actors, from about 100 in the smallest communities to some 800 in the largest, with different interests and agendas. Additionally, there are the interests of external actors: government, private sector enterprises, NGOs. These interests are not solely in land but also

in other resources – water in the subsoil included and, in the case of forests, trees, fauna and flora. Local actors, in this case the ejidatarios, often have to deal with external actors' interests and protect their own.

Most interviewed ejidatarios in San Juan de las Huertas have not been involved in the decision making concerning the park, nor do they have knowledge of things happening in it. Because not many services are offered and the demand is relatively low, there are only two permanent workers in the park whose main job is to collect the entrance fees. During the weekends some people offer food. Although the people at the gate are also in charge of the accommodation, the rooms are always kept closed, although one of the buildings is some 5 km distant from the gate. This means that if visitors want to use the facilities they have to go back to the gate. The list of ejidatarios contains about 800 names, but one of the representatives says that the actual figure is 346, although the list is being updated at the present time. The number of jobs compared to the number of ejidatarios shows the small opportunity that there is in getting fully involved or obtaining direct benefit from the park. The number of ejidatarios compared to the total inhabitants of the community (10,718 in 2000 according to the Instituto Nacional de Estadística Geografía e Informática, 2000) gives an idea of what would be needed to achieve real economic benefits for the community as a whole and stresses the reason for the lack of interest in the park as an economic source.

Representatives of the Assembly are directly responsible for the functioning of the park but because they are changed every 3 years it is difficult to have continuity in the management. The representatives have many other tasks concerning the ejido and are not paid or have an incentive for the time they spend in any of these activities. All of these factors results in neglect of the park.

Nevertheless, it is admitted by most of the interviewed ejidatarios and present and previous members of the Comisariado that revenues from the deer park have been used on many occasions to contribute to various community works. Among community works, paving roads, building and expansion of cemetery and schools, and building of a multi-purpose hall are quoted. Still, interviewees do not think they are being directly benefited because they do not get any money from the park and most do not consider community works a personal benefit. Community works seem such a vague and general category that it is easy to think 'the community is benefiting but not me'. Through community works, non-ejidatarios also benefit from the revenues of the deer park but they do not consider themselves as getting any benefits (as will be considered later).

The deer park can be looked at from different perspectives. Most interviewees look at it as an ecological inheritance for the community, even as a source of income, but nobody looks at it as an enterprise deserving of proper upkeep through investing most of the revenues at first, if it is going to be profitable in the long run. The implications are that investment would be considered as a necessity so instead of taking all revenues and spending these in meeting the needs of the ejido, some of them would be left for the park to make some improvements. Also, as an enterprise the need would arise to look for clients (visitors) instead of waiting for clients to find the park. An enterprise would have a manager to dedicate his/her time and energy to its needs. The

Comisariado is currently in charge of the management of the park but they do not only deal with the issues of the park, they also have to give attention to the other needs of the ejido. Besides, they do not receive any payment for their work (although in practice, some of the revenues of the park are used to cover the needs of the Comisariado). Because the park belongs to the ejido there is a lack of personal responsibility for it. These problems are partly the result of something else. When the deer park was established in the 1970s, according to the recollection of the interviewees, the agreement was set between a representative of the government and one presiding member of the Comisariado at that time. In theory, decisions like this would first be consulted with the Assembly before they are put into practice. The presiding member of the Comisariado said the reality was that the project was set up without consulting the Assembly and then the Assembly was only informed. Some ejidatarios objected to this procedure, the man recalls, but because it was set to benefit the ejido everybody ended up accepting it. Whether the involvement of all (or more) ejidatarios from the beginning would have made a difference is difficult to say. In any case, the financial and technical problems, together with the challenge of consensus would have been present, as is the case at the present time.

The degree of involvement of ejidatarios demonstrates or suggests that they do not feel committed to the project of the deer park. They can hardly recall when, how and why the project was started. They do not know how it is managed at the present time, except that the Comisariado is in charge of it. They do not know the number of cars that enter every week, the seasonality of visitors to the park or the revenues that are obtained. They are not periodically informed, nor do they seem interested to ask.

Investment for tourism

Because ejido land is held in common, the revenue has to be divided among all members. It is well known that rural tourism has to be taken as a complementary economic activity and that, in most cases, it would not generate enough money by itself to sustain a family because it normally is carried out on a small scale (Sharpley and Sharpley, 1997; Roberts and Hall, 2001; Dice, 2002). When the income is divided among all the members, the amount can come to nothing.

In San Juan de las Huertas, even if the ejidatarios wanted to meet the potential of the park, they reported feeling helpless because of the lack of adequate training for tourism services, and resources for investment. Former representatives of the Assembly that were interviewed affirm that the income from the park, as organized at present, is only sufficient for subsistence so it is not worth spending much time or energy on it. Those interviewed made it clear that the income they get, they prefer to spend on something else rather than inject it back into the park. This has brought benefits to the community because the money has been used to pave roads, build schools, a cemetery and, most recently, a hall for multiple uses with offices for the representatives. This has been at the expense of the park where the buildings and installations look old and neglected and there is hardly enough personnel to care for the facilities.

There are various governmental programmes providing financial support and technical advice for rural communities. Some of them may not be specially directed to tourism projects or enterprises but can be used for them. One of the problems of San Juan de las Huertas ejido (and consequently the deer park) is that the representatives do not know about some of these programmes or how to find access to them. Another problem is that when the Nevado de Toluca National Park was decreed in 1936, it was not expropriated to the owners (namely ejido, common or private property). Expropriation meant that the owners were somewhat compensated (or paid) for taking away their resources (land and woods in this case). Other national parks were expropriated by the federal or state governments and are managed through their Secretariat or ministries. In the case of the deer park (and particularly the Nevado de Toluca National Park) nobody assumes responsibility for their conservation and improvement. The municipality assures they do not have any jurisdiction (or responsibility) in the deer park because it is a national park and only the federal or state institutions can intervene in it. Federal and state institutions argue they do not have any jurisdiction (or responsibility) in the deer park because it is ejido land and only the ejido know what is the best for the park and can manage it. The ejido say they cannot do it themselves and should get governmental support. Besides, representatives of institutions like CEPANAF argue that enough money has been invested into the deer park but the San Juan de las Huertas ejido has not been able to give adequate maintenance and keep the installations in good shape. This may not be far from reality, still the question may be, what is the best way to manage an enterprise like the park in this kind of context and has anybody been shown the best way to do it? Going back to the initial question, is the ejido a suitable structure for managing rural tourism?

Implications for poverty reduction

Furthermore, when the agreement was established in 1975 the deer park was thought to be for ejidatarios as heads of households (and by extension to their families) – who were conceived of as being in greatest need, leaving the rest of the community out of the project. Over the years, when there has been no financial support for the advancement of the deer park, the direct beneficiaries have been the ejidatarios. Whether the non-ejidatarios are better off than the ejidatarios and therefore do not need government support it is difficult to affirm. It is risky to assume that the ejidatarios are a homogenous group that is better off or worse off than others in the community. Most ejidatarios have more than one income-earning activity and even if they do not get enough money from the farming activities they may get it from their other activities. Some interviewed non-ejidatarios work as farm labourers and have no other income source. Moreover, the ejidatarios do not have the same size of plot, the same size of family or the same needs for that matter. Neither do non-ejidatarios (or *avecinados*). The fact of the matter is that when the deer park was constituted for ejidatarios, in theory the rest of the community was excluded from decisions and the direct and indirect benefits. In practice, the *avecinados* could have found a

mechanism to indirectly engage in decision making concerning the deer park. For instance, as one of the interviewees suggested, they could have friends that are ejidatarios and through them get acquainted with the situation of the park. Beyond, they could hold discussions about it, express their opinions and if the ejidatario agrees with them, unconsciously get him to express those opinions at the Assembly.

The San Juan de las Huertas ejido nevertheless, has, unlike some other ejidos, decided to use the revenues for community works (as mentioned before) instead of dividing them for personal income. This action has meant benefits for the whole community instead of only the ejidatarios as the whole community uses the roads, cemetery and other works. Yet, this situation has not prevented some non-ejidatarios from feeling excluded and thinking they should also participate in the decision making concerning the deer park.

The 1917 Agrarian Law was set to protect the interests of the ejidatarios from the *hacendados* (hacienda owners) or other upper class people. One of the stipulations was that only the ejido members could participate in the Ejidal Assembly. This stipulation prevents the participation of anyone external to the group that could have personal hidden interests. The stipulation survived the 1992 Agrarian Law. The problem is that settlements grew and at some point there was no more land to expropriate. San Juan de las Huertas itself has records of land requests for extension since 1937 but even though the need of the community members for land was acknowledged by the Agrarian Authorities, it was stated that there was no land left to expropriate. The impossibility of making new additions to the ejido meant that community members that were not already ejidatarios by 1935 could not become one unless by succession or replacement and therefore directly participate in the decision making of the deer park.

The implication of poverty reduction in rural communities in that way (i.e. that the community itself gets the revenue) does not consider who needs more support. It is rather about who is ejidatario and who is not. Even if theoretically ejidatarios are worse off, in practice this may not be true. An ejido-approach to community development and poverty reduction only assumes but does not prove that, in effect, *all* ejidatarios in one community need help over the rest of the members.

Conclusions

The deer park is an example of a rural tourism initiative managed by an ejido, San Juan de las Huertas. Although a tourism initiative based on a form of collective tenure may face the same challenges as one based on individual tenure, there are some additional ones. The need for consensus and the sharing of benefits are examples of these. Challenges have been discussed here under three subheadings: ejido as an appropriate rural tourism management unit, investment for tourism, and community development.

The ejido is a complex unit. It involves hundreds of people with different needs and agendas coming together and making joint decisions because the collective ownership forces them to agree upon the direction that the deer park

management is to take. They have different ideas of what it should be like. Some want to keep it as it is because they say the most important feature that the park has to offer is its natural beauty, plus they consider it an ecological inheritance that should be preserved. Others want to add few attractions that do not change its main features but could attract more visitors. Yet others want to turn it into a modern recreation park with electric games, motocross and so forth. In the end nothing is done partly because of lack of agreement (but also other issues). This discourages the ejidatarios and eventually they stop trying to get involved.

There is also the issue of investment. So far, the infrastructure that has been built in the deer park has been subsidized by governmental agencies. The responsibility of the ejido has been to care for and maintain the installations and services. Nevertheless, the installations have been neglected. The cabins and dormitory are closed most of the time, the paint looks washed out, the grills of the sunshades are rusty and there is litter in many areas of the park. The income from the park has been used for the needs of the Comisariado Ejidal (particularly travel allowances), to pay the few workers at the park and occasionally to contribute to some community works. The money has hardly been used to meet the needs of the park and give it the appropriate upkeep. The condition of the park changes as the Comisariado Ejidal changes. Each Comisariado has its own ideas on how the park should be managed and some give it more importance than others but so far an important investment has not come from the income of the park itself either because there is not enough money or because the priorities are different.

The Agrarian Law has prevented non-ejidatarios from participating in issues of the ejido. While this measure has to some extent protected the interests of the ejidatarios, projects that are directed to ejidatarios only assume that they and their families are those who most need support. The reality is that the ejidatario group is as heterogeneous as the non-ejidatario or *avecinado* group. Most of the ejidatarios have more than one income-earning activity while some of the *avecinados* have only one with the difference that at least the ejidatarios have their land and if the *avecinados* do not have a high education the only asset that they have is their low paid manual labour. I am not suggesting that the ejidatarios as a whole are better off than the *avecinados* because that is not the case. What I am arguing is that both groups are economically heterogeneous and it is a mistake to assume the contrary. Programmes that aim to support the disadvantaged need to consider the specific circumstances and not to assume that belonging to either group is an indication of anything.

Endnotes

[1] Acknowledgements
The author would like to thank Dr Christine Okali and Dr Nitya Rao for reading and commenting on this chapter.

[2] This is an underestimate because rural families are normally larger.

[3] Simple definitions are hardly adequate for a serious consideration of the many aspects of rural tourism and deconstructions of the concept of rural tourism can be

found elsewhere; Lane, B. (1994) What is rural tourism? *Journal of Sustainable Tourism* 2, 7–21; Roberts, L. and Hall, D. (2001) *Rural Tourism and Recreation: Principles to Practice*. CABI, Wallingford, Oxon.

[4] This number is based on the average household size of five recorded in the 2000 census.

[5] While there were few deer in the park in the 1970s, there are none nowadays but the park keeps the name.

[6] This information was assembled through interviews with the Representative of the Assembly at that time and observation.

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Other information was obtained from interviews made to ejidatarios, representatives of the Assembly and some authorities during the first 4 months of fieldwork.

16 Living in Hope: Tourism and Poverty Alleviation in Flores?[1]

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Introduction

A growing body of literature exists that suggests tourism can be used to create pro-poor growth and benefit the poor in areas where there are limited resources for development (e.g. Ashley *et al.*, 2001; DFID, 1999). However, while tourism to remote parts of the less economically developed world has seen constant increased growth, evidence seems to suggest that this has provided scant benefit to the poor. Moreover, the literature suggests that for tourism development to help alleviate poverty it should be developed from the bottom-up, but is this model a dream or reality?

This chapter presents findings from a longitudinal (1989–2005) ethnographic study on Ngadha, Flores, Indonesia. Methods have involved participant observation, focus groups, and interviews with a variety of stakeholders. It analyses why, despite impressive natural and cultural resources, tourism has done very little to alleviate poverty in the area.

The evidence suggests that cultural reasons, local hegemonies and power politics may limit entrepreneurship and the accumulation of capital. The research identifies the roles played by the government that have inhibited bottom-up development. As in many remote areas of less economically developed countries, bureaucrats lacking an understanding of tourism took decisions and planners believed that the local people were uneducated and too ignorant to be involved. Furthermore, due to the ubiquitous Indonesian patrimonial system, decisions made by the authorities could not be questioned. The New Order government has been responsible for restricting participation, belittling villagers, and creating fearful, unconfident communities. In addition, the impact of recent anti-backpacker policy that has discouraged the types of tourists Flores, and other remote marginal communities, need to attract, is explored.

The final part of the chapter examines how global, national, natural and political disasters have besieged Indonesia's tourism and hampered the villagers'

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attempts to make a living from tourism. Forest fires, the Asian financial crisis, political unrest on other islands, bombs in Bali, negative travel advisories, SARS-induced panic, and the 2004 tsunami have meant that the numbers of tourists to Flores has been unpredictable. In many cases the villagers on Flores were unaware or did not understand why the number of tourists that visit fluctuated or why their tourism dried up 'without explanation'.

The study questions if a community could rely on tourism as a prime tool for development, even if their government encouraged local community participation and was committed to pro-poor tourism development. Tourism numbers and the benefits they bring are not within the control of a local community. They are not able to control their destination image, international media, or foreign governments' travel advisories. Tourism may bring the dream of development, and the hope of an end to poverty; however, the realities may be very different.

Tourism, Development and Poverty Alleviation

Tourism's potential contribution to development is the fundamental justification for encouraging the sector. While defining development has been subject to debate, present day conceptions can be summed up as a multidimensional process leading to 'good change' and seen to embrace self-sufficiency, self-determination and empowerment, as well as improved standards of living (Scheyvens, 2003).

The arguments for tourism as a vehicle for development and as a strategy for economic growth in developing countries are well rehearsed (de Kadt, 1979; Mathieson and Wall, 1982; Pearce, 1989; Richter 1993). Tourism is a growth industry, and it contributes to foreign exchange earnings, creates employment and leads to economic diversification. Tourism makes use of natural 'free' assets such as beaches and mountain views and, as such, has relatively low entry costs. Tourism also has the ability to attract inward investment for capital projects (Williams, 1998) and the infrastructure improvements needed for tourists will also help local communities. Unlike nearly all other industries, it is not subject to trade barriers such as tariffs and quotas (Lickorish, 1991). Furthermore, tourism is generally perceived as a smokeless industry that has less negative environmental impact than other sectors and can provide the economic incentive to protect habitats which might otherwise be destroyed. Seen from this perspective, it is not surprising that so many less economically developed countries promote tourism. This is especially the case in areas that have few primary resources and a small industrial base, where tourism often constitutes the only viable economic opportunity (Oppermann and Chon, 1997).

Added to these macro economic reasons there are a number of powerful arguments why tourism is believed to be able to alleviate poverty and contribute to local level development. Tourism is a labour-intensive industry and many less developed countries have severe unemployment problems (Tribe, 2005). Furthermore, many of the jobs in tourism are relatively unskilled, providing opportunities for women and other marginalized groups (Ashley *et al*., 2001). As tourism delivers consumers to the product, locals have a new market for their products and services. Thus tourism has the potential for linkages particularly to

traditional livelihood occupations such as agriculture, fishing and handicraft production. This means that tourism expenditure has the potential to generate a large multiplier effect, which can stimulate various parts of the local economy. The economic multiplier in tourism is greater than in many other industries, especially in the informal sector, with its low entry barriers in terms of investment and skills.

While many less economically developed countries struggle to develop their tourism due to inadequate infrastructure, lack of trained personnel and corrupt, inefficient and inexperienced government bodies (Harrison, 2001), attention has turned to initiatives that develop tourism from the bottom up such as 'community-based tourism', 'pro-poor tourism', or 'alternative tourism'. A number of reasons for this new focus exist: if tourism is to be a tool for development it must focus attention on poverty alleviation. Evidence from the literature suggests small-scale enterprises present greater opportunities for control and profit by local people (Rodenburg, 1980) and that guesthouses import less than hotels and as a result the multiplier is greater (Milne, 1992). Furthermore, Britton argued that small-scale tourism enterprises have a greater impact on improving rural living standards, reducing rural-urban migration and countering structural inequalities of income distribution (Britton, 1982: 183). Small-scale tourism places value on natural and cultural resources and can be developed without great capital investment in remote and marginal regions where a disproportionate number of the poorest people live. Much of the labour requirements are for unskilled workers, improving the opportunities for women and disadvantaged groups to earn money (Roe and Khanya, 2001). As tourism can stimulate employment, the drive for young people to migrate to urban areas is reduced, leaving a more balanced population in remote rural areas. Tourism is also considered to stimulate small-scale and micro-enterprises empowering previously disadvantaged members of communities, and further helping to alleviate poverty.

As discussed elsewhere (Cole, 2006a) developing tourism in poor remote areas has benefits that go beyond economic. Tourism can be a powerful tool to empower marginal communities. Many researchers have discussed how tourism brings about pride (Crystal, 1978; Mansperger 1992; Van den Berghe,1992; Boissevain,1996; Adams, 1997; Cole, 1997; Erb, 1998). Tourism can also enhance community cohesion (Sanger, 1988; Ashley et al., 2001). Tourism increases access to information and external contacts (Ashley et al., 2001; Forshee, 2001), as well as new language skills and globalized media (Williams, 1998). Through tourism, communities come to value their cultural assets; it increases their confidence and can strengthen their political identity (Swain, 1990; Johnston, 1992). These are all signs of empowerment.

A consensus of opinion in tourism and development literature suggests that to bring about tourism that will be effective as a tool for development in its widest sense, community participation is essential. This is a complex notion and includes questions over who makes up a community (Cole, 2006b) and at what level their participation needs to be.

Even if definitions were easier, and communities less complex, there are a number of reasons why active community participation is hard to achieve in practice: lack of ownership, capital, skills, knowledge and resources all constrain the ability of communities to fully control their participation in tourism

development (Scheyvens, 2003). In many communities, such as the ones discussed here, where monetary exchange is a relatively recent phenomenon, villagers fail to accumulate capital. There is often pressure from relatives to redistribute gains from tourism, and/or a desire to gain prestige from the conspicuous public display of wealth, such as donating livestock for rituals. Consequently, for many marginalized people, gains from tourism are short lived.

A lack of knowledge about legal and financial processes makes the poor vulnerable to exploitation by local elites and outside business interests. Several researchers have discussed how a lack of knowledge is the constraining factor in marginalized communities in the world (Sofield, 2003; Cole, 2006b). Participation beyond lip service and rhetoric cannot be achieved without elucidation (Cole, 1999). Knowledge of tourism must be a precursor for those who want to participate in decisions about tourism planning and management. Many communities lack any real understanding of what it is they are supposed to be making decisions about (Sofield, 2003). The villagers in this case bemoan their lack of understanding of tourism and this is one of the reasons that the reality of bottom-up development remains so elusive.

Evidence suggests community responses to tourism are partly determined by their prior access to local resources, the level of consensus and cohesion in the community and the degree to which they are able to work with outside institutions. Communities have adopted and adapted to tourism when in productive and sympathetic partnerships with external agencies such as NGOs and private sector players (Harrison and Price, 1996: 8–12). The ideal of many 'community based initiatives' is for the local community to have a high degree of control over the activities taking place and a significant proportion of the benefits accrue to them (Scheyvens, 2003: 10) but, as this study illustrates, locals are not likely to ever have a high degree of control over tourist arrivals due to global and national events outside of their control. It is for this reason that any tourism development strategy must be part of an integrated development strategy; tourism should only ever be one string on a community's bow.

Following a brief description of the study, I will examine the reasons why, in this community, poverty alleviation has been more about dreams than realities. It will evaluate the roles of aspects of the villagers' culture, Indonesian governance and policy, and external factors, which have resulted in roller coaster arrival statistics. It examines why the villagers' participation has been largely limited to receiving tourists in their midst, the selling of crafts, and occasionally engaging with them.

Methods

This study was based on long-term research over a period of 15 years (1989–2005). I operated tours in the area between 1989 and 1994, which included 2-night stays in one of the villages under study. The success of the tours influenced the research that followed. Bringing tourists, income and piped water (Cole, 1997) developed trust and rapport with the villagers. In 1996 30 questionnaire-based interviews were carried out to explore the villagers' views

and attitudes to tourists and tourism. This provided the baseline for further study. Between July 1998 and February 1999 I spent 8 months carrying out ethnographic fieldwork to investigate the values, attitudes, perceptions and priorities of the actors in tourism. Participant observation was undertaken in a number of villages, and living in two villages provided the opportunity for interviews and focus groups with the villagers. Tourists were observed, interviewed and surveyed at different points during the study, and government officials were interviewed. Short return visits were made in 2001, to collect further data, and in 2003 to hold a seminar to share the results of my study. In 2005, with a grant from the British Academy, I returned for 1 month for a follow-up study to specifically evaluate the use of a code of conduct as a tool to educate tourists about their behaviour in the villages. (Cole, 2007a).

The Study

The study was based in two villages, Bena and Wogo, in the Ngadha region of Flores, Nusa Tenggara, Timor (see Fig. 16.1). Ngadha is positioned between two of the region's primary attractions: Komodo to the west (home of the world's largest monitor lizards *Varanus komodoensis*) is the main pull factor for visitors to eastern Indonesia (Erb, 2000). Keli Mutu, a volcano with three different-coloured lakes, draws the tourists further east.

The area is one of the poorest in Indonesia and tourism is considered the area's best option for economic development (Umbu Peku Djawang, 1991). The villages lie in a rugged mountainous region with steep slopes and poor soils. Most villagers live close to or below the poverty line by international standards. The villagers subsist on growing maize and vegetables for their own consumption. Small amounts of cash are derived from the sale of beans, coffee, vanilla and pepper, craft production and remittances from family members working away.

Drifters began visiting the villages in the 1980s and their numbers increased through that decade and into the 1990s. Erb (2000) reports an 18% annual increase between 1990 and 1995 in Manggarai (the regency of Flores to the west of Ngadha). Between 1987 and 1997 Indonesia's inbound tourism grew from just 1 million to over 5 million. By 1997 tourism accounted for 10.2% of Indonesia's exports (WTO, 1999). In that year, Bena's best, 9000 tourists visited the village (Cole, 2007b).

With increasing numbers of tourists the benefits of tourism were felt by the villagers. In the late 1980s and early 1990s funds from tourism brought piped water to both villages. Since then, in Wogo several houses have used electric pumps to run water to bathrooms (*kamar mundi*)[2] behind their houses. In Bena, an aid agency match-funded donations collected from tourism to provide one standpipe per four houses.

The roads in Flores were improved substantially in the last two decades of the 20th century. Although still inadequate, the road to Bena was upgraded, in part due to the needs of tourists, and the villagers are aware of this fringe benefit from tourism. The improvements mean that villagers can travel to and from
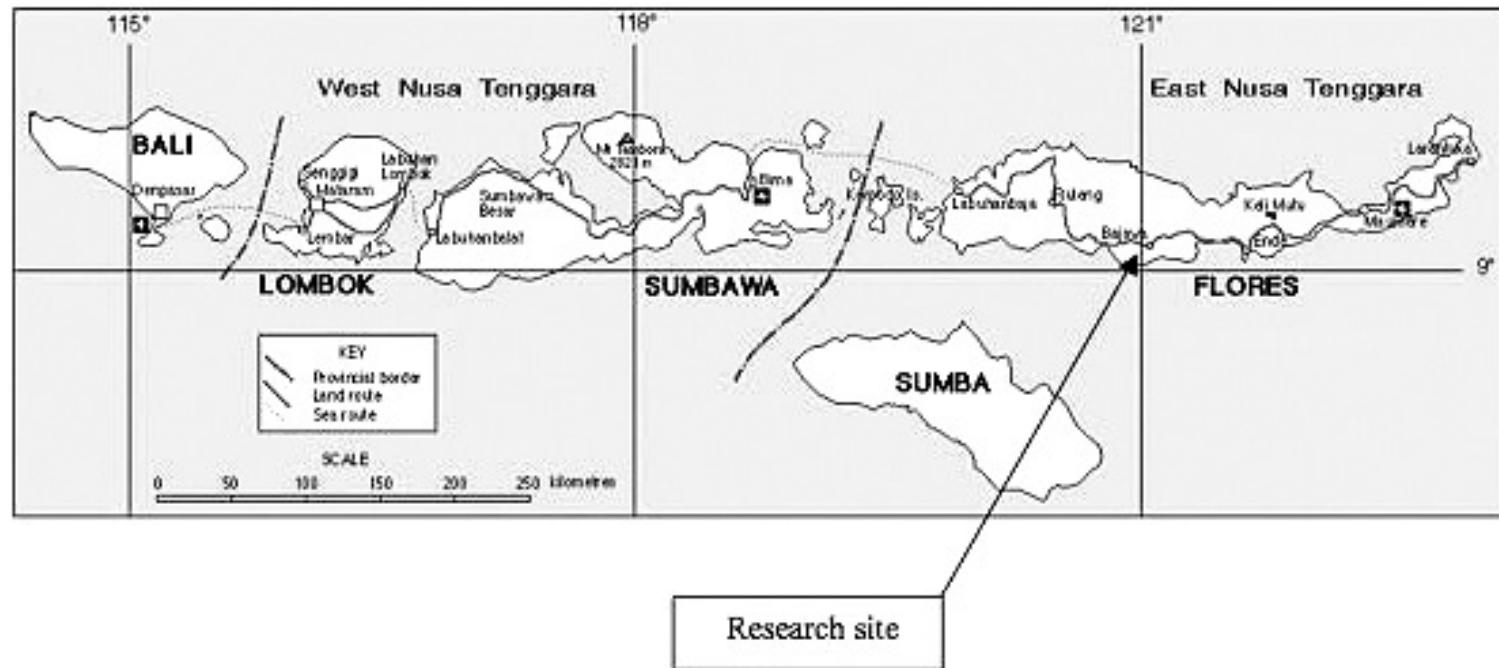
Fig. 16.1. Map of Eastern Isles showing location of research site.

Bajawa, the local market town, more easily. This has meant better access to schools for teenagers in Bena and the access has improved sales both of *ikats*[3] (hand woven fabrics) and agricultural produce. It has also facilitated the purchase of diesel for generators. However, as roads have improved, tourists are taken to more villages and spend less time in each village. This has had a negative impact on sales of souvenirs to tourists in Bena.

The cultural contact brought, in part, by tourism has had a significant impact on the villagers' lives. As tourists have shown interest in the villagers' lives, the villagers have developed a self-conscious awareness of their traditions. Their shame at being part of Indonesia's 'isolated peasantry' (Li, 2000) is being replaced with pride. They have seen the name of their villages (and specific people) appear in international guidebooks. Tourism has increased the villagers' self-esteem as people come all the way from the other side of the world to see their villages. Tourism has reduced their isolation; it has brought contacts in distant places, and links to the wider world. Knowing foreigners brings social and potentially economic advantage. The two members of the villages that have studied to postgraduate level outside Indonesia both worked as 'guides' in the early days of tourism. Other guides have used their European friends to help with education for themselves and for their relatives. Other tourists have helped with medical care or sent regular donations to help families in the villages. Through tourists some villagers have become well interconnected with the wider world.

In 1991 I stopped taking tour groups to Wogo and moved to a more remote village, the villagers (and I) were sure that they were at 'take-off'. The village had entered the Lonely Planet Guide Book and independent travellers visited the village on a daily basis. The villagers were enthusiastic about tourism: it had brought them hope of a new opportunity for development. In the survey in 1996 they talked of plans for the future, of ideas, of hopes and of dreams.

In Bena, tourism has become part of the economic fabric of the village. For a variety of reasons: greater scenic beauty, less fertile soils, better relations with local guides, Bena has received far greater government intervention in tourism (Cole, 2007b). However, as in Wogo, all villagers felt that tourism had the potential to bring further development to the village. Underlying the lack of development in Wogo and the slow pace of development in Bena are a number of factors. The factors can be divided into internal and external, although there is clearly interplay between the two. Before examining the external factors, the internal factors are discussed in turn below: peripherality, the history of outside authority, a hierarchical authoritarian government, a collectivist culture, a lack of confidence and feeling belittled, and an anti-backpacker policy.

Indonesian Governance and Policy: Contradictions and Challenges for Pro-poor Tourism Development

Ngadha is in a peripheral position as a result of geography, past processes and economics. The region is hundreds of miles from the provincial capital, Kupang, which is a remote outpost of a nation, itself, from many perspectives, peripheral

to the world system. Combined with its remote geographical position, the region has minimal industry, and as a result is peripheral in economic terms. Further, the Ngadha are Catholic and the majority of Indonesians are Muslims. The Ngadha are not part of the Indonesian mainstream in terms of cultural history, having never been part of one of the major Javanese or Malay kingdoms. Moreover, nothing yet has put the Ngadha on the 'cultural map' of Indonesia, unlike some other minority groups (e.g. the Toraja, Batak, or Dani).[4] Despite this peripherality the Indonesian government has had an important impact on the villages.

Under the leadership of the first president of Indonesia, Sukarno, the principles of *Pancasila*, the five principles to safeguard national unity, were formulated. *Pancasila* remained the national ideology under the New Order government of the second president, Suharto, who treated the principles as religious in nature (Erb, 2001) and used them as an ideological justification for authoritarian rule (Schwarz, 1999). In order to maintain unity, stability and economic growth, the New Order maintained order and control through authoritarianism, patronage and bureaucracy.

Across the archipelago, Javanese concepts of power and authority (Anderson, 1972), whereby reverence is shown towards people in power or otherwise high social standing, prevail. Accordingly, from high-level political jurisdictions, down to the village level, the top-heavy traditional perspectives of power remain strong (Timothy, 1999). Villagers accept and expect political and social control to be in the hands of the government. They are taught blind obedience to central government (Erb, 2000), and there is a belief that the government knows best (Gede Raka, 2000). The villagers' and local government's attitudes to tourism development need to be understood against this backdrop.

The hierarchical structure of the Indonesian government is highly bureaucratic, with the state administration extending to very local levels. The pettiest officer (*ketua* RT) administers only 12 households. The government has been heavily committed to a centralized, bureaucratic process of decision making. As Reisinger and Turner (1997) suggest, the authorities make decisions and they cannot be questioned. In dealings with state officials, the villagers' fear of authority could easily be sensed. While many villagers were openly critical of decisions relating to tourism development with me, they believed that decisions taken by higher authorities could not be challenged.

The villagers' experience of outside authority has also come from the Catholic Church. They have become used to acting on instructions and do not feel empowered to act without being directed. Further inaction resulted from 'the need to be asked'. The sale of ikats in Bena began when tourists asked to purchase ikat cloths hanging on washing lines. The request came from the tourists. Most long knives (*parang*) are still sold in this way although a few are now hung on terraces, in Bena, in a deliberate attempt to sell them. The villagers make and use rice baskets *(wati)*, gourd bowls (*ngeme*), wooden and coconut ladles and draining spoons, but these are not offered to tourists. As these are kept in the inner sacred rooms of houses which tourists rarely enter, tourists do not see them or ask to purchase them. When villagers were asked why they did not sell these items to tourists, I was told, 'Tourists have not asked to buy them'[5]. The

tourists I took to Wogo did enter the inner rooms and requested to buy various items. The villagers were happy to give them away. 'Have it, we can easily make another one'. It did not occur to them to sell these objects. Later, when recounting their strange experiences with tourists, they would giggle and say, 'They wanted our old spoons'.

The tourism department endorsed the view of waiting for requests to come from tourists by saying 'villagers shouldn't force their wares on tourists but should provide them if requested'. While the government may have been trying to prevent tourists being pressured into purchasing souvenirs and services, it was communicated as an instruction and obediently followed. When, in discussions, I asked why they had not tried a number of initiatives to raise money, they always said, 'No-one has told us to' (*tunggu disuruh*). The villagers have become so accustomed to only acting on instructions from higher authority that they are apprehensive about following internal initiatives. The villagers lack confidence and wait for tourists to make requests rather than proactively marketing their crafts.

Indonesian culture is collectivist and group orientated. 'The focus is on group rights and needs….In all social relations the importance of group harmony and living together in harmony is emphasized' (Reisinger and Turner, 1997: 142). This has impacted on tourism development from two perspectives. First, the importance of the collective over the individual has consequences for entrepreneurship. Entrepreneurial spirit in individuals is frowned upon because it can lead to envy and bad feeling. Community consensus has to be guarded, it is the 'the mother of *adat*' (custom)[6] (Zainal Kling, 1997: 48). It is necessary due to 'the density and intimacy of social life' (Just, 2001: 110). Villagers find it hard to rise above the majority. This was borne out on numerous occasions in conversations and comments from the villagers. 'Don't grind too much coffee, or someone will see it and ask for some', 'There's no point in having a motorbike because everyone would use it', 'There are differences in wealth but we should not allow them to be seen'. Successful individual entrepreneurial activity can result in an observable difference in the community, leading to envy, resentment and lack of community cohesion. One villager brought groups of tourists to Wogo. His personal gains caused such rifts in the village that he has moved to Labuhan Bajo where he works successfully in tourism.

In such a closely-knit community, wealth is known and there is great pressure to share it. The pressure to distribute wealth means that few villagers are able to accumulate capital. When small gains are made it is frequently invested in pigs, which are then donated at public rituals. This conspicuous display of wealth brings social prestige, strengthens networks, and is a long-term investment (as all pigs donated will be returned at a later date, however, this may take generations).

Amassing wealth gained in tourism seemed especially hard. Tourists wander around the village. If they purchase a souvenir this transaction takes place outside, in view of other villagers who then know there is some cash around. The guides discussed the problems of working in such observable work. 'My family or friends can see if I have tourists, they know when I have a big group, they know I will have cash. Someone in the family always has some kind of pressing need, it's impossible to refuse.' Few of the guides appeared to be amassing any wealth from

their profession due to family obligations and pressures to redistribute wealth. Being part of a collectivist culture inhibits entrepreneurial activity and makes accumulating capital for individual projects difficult. The villagers acknowledged that projects needed community consensus; individuals were unlikely to go it alone.

Second, the collectivist culture is perceived at a national level. From a national perspective, development (*pembangunan*) is a pervasive state ideology. In order to bring about development, Indonesians 'should submit to the collectivity and put the needs and demands of the nation before individual, local, regional, ethnic and class interests' (King, 1999: 61). This involves the need to become Indonesian at the expense of one's own ethnic identity. Ethnic identity was considered a danger to state unity and the New Order government put policies in place to eliminate ethnic identities (Asian Development Bank (ADB), 2002). The government saw isolated people (*masyrakat terasing*) as a social problem, still '*primitif*' and in need of development. To be classified as indigenous, isolated, or native was negative and brought shame. State doctrine attributes 'underdevelopment in large part to a lack of education' (Dove, 1988: 7). Both state and church sponsor the hegemonic view that formal education is a precursor to development. As a consequence, the value of traditional knowledge has been undermined, leaving the villagers belittled. The villagers would say, 'We are only peasants'[7]. They do not feel 'developed' (*maju*) and have a low opinion of themselves, and they use their lack of formal education as a rationale not to try out new ideas.

While the authoritarian and patriarchal government has resulted in villagers who feel belittled, uneducated and lacking in confidence, their participation in tourism is further restricted by their lack of knowledge about tourism. They are unable to participate in the planning and management of tourism due to their lack of understanding. The villagers were not short of ideas about potential future developments but they did not have the confidence, knowledge or skills to put their ideas into practice. In both Bena and Wogo, the villagers bemoaned their lack of knowledge and expressed a desire for more tourism education. Villages in Bena blamed the state for not providing the necessary training.

Indonesian Anti-backpacker Policy

The rhetoric of community participation and empowerment is evident in the government publications on tourism. *Indonesia's Tourism Vision* suggests that local communities should be given the maximum opportunity to participate in tourism development and that there is a commitment to empowering communities (Gunawan, 1999). Furthermore, 'the community is at the heart of the development plan; local norms and values must be appreciated and respected' (Gunawan, 1999: 159). However, we must question how far this rhetoric is part of policy and strategies.

The literature suggests that independent travel can create proportionately more economic opportunities than international package tourism (DFID, 1999). Hampton (1997) suggests, 'backpacker tourism is a potentially vital tool for real

economic development' (1997: 376). However, the Indonesian government does not support backpacker tourism. Indonesia's official tourism policy has either tacitly ignored or actively discouraged backpackers (Richter, 1993; Hampton, 1998; Erb, 2000); although, as Dahles (1999) discusses, the government agreed to encourage small-scale projects, especially in the outer islands.

The lack of support for backpacker tourism is surprising since they are considered the pioneers in tourism development and, as Oppermann and Chon (1997) suggest, it is imprudent to ignore trendsetters. Furthermore, backpacker tourism creates a demand for cheap accommodation and a parallel structure of transport, restaurant and support services. Due to lower capital requirements, facilities for backpackers are more likely to be locally owned, resulting in a greater economic benefit for and more participation from the local community.

The Indonesian government's visa policy changes are the most recent and significant anti-backpacker policy that have come at a critical time for tourism in Flores and many of the other outlying destinations. Many changes (with the changing government and ministers) have resulted in confusion. The present policy (2007) is intended to be good for tourism generally, but is very detrimental for Flores and other remote marginal destinations that are dependent on backpackers.

Prior to the changes, tourists were entitled to a 60-day visa issued on arrival. This Visa on Arrival (VoA) is now limited to 30 days. This visa policy change is considered 'the most dramatic U-turn in the country's history of tourism' (Travel impact newswire, 2003). The policy was initially justified to fight terrorism and prevent terrorists entering the country, however, all the terrorists that have operated in Indonesia have been home grown.

The visa fee triggered massive protests. In Bali, local tourism players staged a street rally, not only fearing that the fees would put tourists off and thus the move would further dent the country's beleaguered tourism industry (see below), but also that the fees were collected by the central government and were not being given to Bali. In 2004 US$29 million was collected (Hudiyanto, 2005). Furthermore, visas on arrival are only issued at certain entry points. Lombok, for example, has not been included and 'even before the new measures 62% of hotels in Lombok could not cover their costs' (Osbourne, 2004).

For Flores the problem is the limited time allowed for tourists to stay in Indonesia. During my research in 1998/99 many tourists claimed to be running out of visa time, being in a hurry, or not spending as much time on Flores as they had wished. At the time tourist visas were issued for 60 days. The majority of tourists were Europeans, and Australian, many on travels through South-east Asia, on their way to or from Australia. In 2005 very few long-term travellers were in Flores. Backpackers that 'did' Indonesia only had time for Bali, the Gili Islands and the iconic sites of Java; visa time did not allow them to travel further afield. While tourist numbers in August 2005 were at record levels, the season in Flores was the shortest they had known and the type of tourists had changed. In April, May and June there were virtually no tourists. One couple stayed for 3 days and met no other tourists at all. In July there was less than a handful a day then in August tourists queued to walk up the steps from one terrace in the village to the next.

For a number of cultural, historic, geographic and policy reasons the villagers in Flores have struggled to gain the full potential that cultural tourism could bring. While it is possible to lay blame with the government policy, both past and recent, to understand the full picture we have to look beyond Indonesia.

External Forces

In this final section I would like to discuss how global events, many miles from Flores, have shaped the tourism development that has taken place. In many cases the villagers are unaware and do not understand why the numbers of tourists that visit fluctuate and why tourism dries up 'without explanation'. As discussed elsewhere (Cole, 2007b) the data for tourism in Flores are extremely hard to come by and very unreliable. However, it is possible to extrapolate from my frequent visits, and data from Bali and Komodo. While it is important to provide a little background to the Indonesian political situation I want to concentrate the analysis on the external forces: terrorism, other governments, and the media.

Tourists visited Flores in their greatest numbers in 1997. That year saw forest fires and a smoke haze spread across the northern parts of the archipelago. Television news screened pictures of sickness and impaired visibility. The smoke did not reach Bali and Flores but tourism there was affected when prospective tourists in Europe and America 'assumed all of Asia was in a dense brown cloud' (Leiper and Hing, 1998).

In the same year the Asian financial crisis unfolded. In July, Thailand floated the baht, and by August the Indonesian rupiah came under severe attack. It lost 45% of its value between January and September (Henderson, 1999) and the country experienced *krismon* (monetary crisis). By November the crisis had intensified, businesses failed, there was largescale unemployment and prices increased. The inflation of the rupiah resulted in steep hikes in the prices of food staples – the price of rice tripled – so that many people could not afford to eat more than once a day (Hall, 2000). An estimated 50 million people were forced into poverty (Henderson, 1999).

Dissatisfaction with the government's handling of the crisis led to riots that began in Jakarta, where more than 500 people died, and quickly spread to other cities. This was locally referred to as *krispol* (political crisis). The political unrest reached its peak in May 1998 when president Suharto was forced to stand down. 'Graphic images of rioting, killings, destruction of commercial districts in Java and images of mass air evacuations of expatriates from Jakarta in May 1998, made the selling of pleasure travel to Indonesia a difficult task for marketers' (Prideaux *et al*. 2003: 481). The ethnic and religious unrest spread across the archipelago. While relatively minor in Flores, in some provinces the violence escalated and the negative image of Indonesia was reinforced.

The crisis did not affect tourism equally across the country (WTO, 1998). As Hitchcock (2001) discusses, Bali weathered the storm better than some other regions. The island was heavily marketed to domestic markets and in Japan and Korea. Flores experienced the price rises and those living in urban areas needed

the income from tourism more than ever. Despite relative calm on the island, tourism virtually dried up.

In 1999 East Timor voted for independence and violent clashes erupted between residents, local militia, and the Indonesian army. The Indonesian troops and anti-independence militia followed a scorched earth policy when they pulled out. They destroyed public buildings, looted banks, bombed bridges and devastated the infrastructure. Not only did the outbreak of violence devastate the East Timor economy, the brutality of the Indonesian army dealt another massive blow to Indonesia's tourism industry.

For the first time, the travel writing community[8] in Britain put out a press release suggesting tourists and tour operators should boycott Indonesia. In New Zealand a 'Boycott Bali' campaign emerged (Hitchcock, 2001). The Australians also took a strong stance, cancelling tours to Indonesia. As Burns (1999), Wheat (1999) and Holden (2005) discuss, such a boycott raises many ethical questions. Local people, dependent on tourism in Bali and beyond, may have been very unhappy about the actions of the Indonesia military but were incapable of influencing them. Boycotting tourism to Indonesia may have sent an important message to the Indonesian government but it further impoverished the lives of many who had become dependent on tourism. As one villager explained, 'We don't like what the army did, people in Timor are like us.[9] Why don't tourists want to come here, they will be safe?' While the events in East Timor had comparatively little overall impact on tourism to Indonesia, Flores' tourism was disproportionately affected. Not only because of geographical proximity to the troubled province, but because of markets that are particularly susceptible to human rights news, e.g. Australia and the UK were important markets for Flores.

Despite being a largely Muslim country 11 September 2001 had a relatively minor impact on tourist numbers to Indonesia. However, when terrorists targeted tourists in Bali the impact was dramatic and devastating. Immediately after two car bombs exploded in Kuta, killing 202 people and injuring 300 others, Bali's tourism virtually collapsed. Airlines re-routed and hotel occupancy tumbled from a comfortable 70% to less than 10% (World Bank, 2002).

The impact of the terror attack was made worse by the travel advisories. Criticized as politically motivated (see Tourism Concern's campaign) and unfair, Australia, the US and the UK all advised its citizens against non-essential travel to Indonesia. While tourists were encouraged to visit New York after 11 September and were not advised against travel to Madrid following the terrorist attack there, the travel warnings worked to keep tourists out of Indonesia. Sales revenues dropped by 71%, and 30% of schools reported children dropping out because their parents could not afford school fees. The UK, under pressure from Tourism Concern, changed its advice in June 2004. Australian travel advice, warning tourists to avoid all but essential travel to Indonesia, was still in place in 2007. Personal observation and booking levels in Bali in August 2005, suggest that many Australians were choosing to ignore their government's advice. When, in October 2005, tourists in Bali were targeted for the second time the same mass exodus did not result. Following the second bomb neither Japan nor Malaysia strengthened their advisories. However, newspapers reported occupancy levels falling to 20% and less in November (Flores Paradise, 2005).

Despite the devastating impact of the bombs and the subsequent travel advice, SARS (Severe Acute Respiratory Syndrome) had an even greater impact on tourism. SARS spread by travellers infected more than 4000 people and killed 230 in 25 countries. However, this is far fewer than die from seasonal influenza and SARS is five times less infectious than measles (APEC, 2003). It was the SARS-induced panic that led to the mass cancellations and devastation to tourism across Asia. Indonesia saw a 60% drop in arrivals despite no reported cases in the country. Europeans feared transit in Singapore, Hong Kong and Bangkok that all had SARS. Asians feared flying as the media reports emphasized that the virus travels with ease in confined aircraft cabins (LaMoshi, 2003).

For nine years global and national, natural and political disasters have besieged Indonesia's tourism. The country's destination image has been constantly damaged by one event after another. As soon as recovery looks possible another calamity dashes hopes. It should be noted that the greatest single cause of damage was SARS-induced panic; media-induced fear of a disease that never reached Bali let alone Flores. Meanwhile, a rabies outbreak on Flores posed a far greater threat to tourists but was never reported, despite the deaths of 113 people (Windiyaningsih, 2004). The media's impact on tourism should never be underestimated.

The events damaged Indonesia's hope that tourism would continue to increase in the same way as it did in the 1980s and early 1990s – a 475% increase between 1987 and 1997 (WTO, 1999). However, a look at the statistics shows relatively minor decline for the nation as a whole when compared with specific areas. For example, while Indonesia saw declining figures from 1997 to 1998 and 2001 to 2002 (both amounting to approximately 11%), overall the figures have remained stable between 4.7 and 5 million visitors. Compare this with Komodo National Park, which saw a 50% decline (from 30,000 to 15,000) and has never fully recovered (RARE, 2003). The later figures are a much more useful indicator of tourism arrivals in Flores and how seriously her tourism has been damaged.

Conclusions

Tourism has brought income, facilities, cultural preservation and revitalization, early signs of empowerment, and the potential for further development. As tourism has increased and villagers have become used to it, they have become proud to be associated with an activity representative of westerners and modernity. In the early days, tourism brought great anticipation of new opportunities. While many villagers remain enthusiastic, expectations have been reduced and optimism deflated.

Tourism development has been limited for a number of reasons. The importance of the community over the individual has restricted individual entrepreneurial spirit, and a lack of community consensus has limited community efforts. In a tightly knit community, pressures to redistribute wealth mean that accumulating capital is difficult. This is especially the case with money earned from tourism because it is such 'observable work' and earnings are

frequently known to other members of the community. As monetary exchange is a relatively new phenomenon, gains in tourism are frequently invested in the traditional fashion, in social prestige and strengthened networks, through the donation of pigs at rituals.

In its peripheral position, with limited resources Ngadha has, in the main, been bypassed by central government development initiatives. There have, however, been important impacts of the highly bureaucratic, hierarchical structure of the Indonesian state system. Governance in Indonesia has followed the top-down authoritarian model. 'The bureaucracy has positioned itself as the 'prima donna' of economic development at the expense of political development' (Gede Raka, 2000: 29). Decisions are made by bureaucrats, who then inform the people, who are considered uneducated (Timothy, 1999). Encouraging local involvement in decision making has then to overcome official reluctance to listen and consult (King, 1999).

Since the fall of Suharto and his government, participation and local autonomy have been encouraged. However, decisions on national tourism policy are not being made in the interests of remote, marginal, poor communities such as the one discussed here. The new government's change in visa policy may be as detrimental for Ngadha's tourism as all the New Order government policies.

Whatever the government policy, however the governance is delivered, Flores may have more impossible challenges to overcome. Indonesia's destination image, the media and foreign government travel advisories have meant that tourism numbers have fluctuated constantly. Events many miles from Flores have had a significant impact on tourism development. Tourism has offered the villagers chinks of economic light, and even the brightness of opportunity, only to see them fade and virtually disappear. It has offered hopes and dreams but for the vast majority it has changed the economics realities of their lives very little indeed.

While we present tourism as a potential to alleviate poverty in the world's most remote communities, it will bring hopes and dreams. But, on its own, because of its vulnerability to fashion, media and international crisis, tourism as a tool for development may bring very little in the way of poverty elimination.

Endnotes

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[2] An Indonesian bathroom consists of a large tank of water and a scoop. Water is splashed over oneself elephant style.

[3] Originally an Indonesian term, ikat has entered the international textile vocabulary (Hitchcock, 2001). The Indonesian verb '*ikat*' literally means 'to tie'. In reference to

weaving*, it has come to refer both to the verb, i.e. the process to tie a bundle of threads so that they resist the dye, and the finished product of cloth produced using this technique.

4 See Stanley (1998) and Volkman (1990) on the official designation of some ethnic groups in Indonesia.

5 *Belum ada turis yang minta*. (Ind).

6 *Adat*, originally from Arabic, to mean customary law or tradition, the term is far more encompassing, it is essentially religious concept, relating to the rules from the ancestors.

7 They would use the expression 'Kami hanya petani saja' which uses two words for only, before and after the noun for emphasis.

8 The British Guild of Travel Writers.

9 Timor is geographically and culturally very close to Flores.

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