

Traditional Mass Tourism Destinations: the decline of Fordist tourism facing the rise of vocational diversification.

Governance and sustainability in new tourism trends.

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Abstract

The crisis affecting some traditional mass tourism destinations can be related to the evolutionary patterns of the international tourism industry described in the tourism literature by the Post Fordism debate. Tourism supply diversification is the most common action implemented by local tourism policies. But supply diversification is to be considered a new stage in tourism Fordist productive organisation or is the pioneering phase of a new tourism organisational structure? During the 80's the dominant tendency has been to enlarge the tourism season creating new tourism products without a break with the traditional tourism supply. Nowadays the tendency seems to be more related to a radical differentiation in tourism products that create the conditions for a new scenario.

A shift from destinations to territories centrality is nowadays observable as one of the main tendency of local tourism policies. The destinations can generally support a new seasonal supply but the majority of the mass tourism destinations show a tendency to new relationship with surrounding territories to provide a more complete and integrated tourism supply. Individual experience and personal motivations are the new asset determining tourist's flows and as a consequence territorial *vocations* seems to be the new development driving force. As a result the collective consumption of undifferentiated tourism products is no more able to satisfy the new tourism demand. Governance processes are a core element in this evolutionary phase. Competition for limited resources between traditional tourism stakeholders and the new protagonists of niche tourism sectors oppose conflicting interests. At the same time from an industry point of view the need for effective quality standards in the new tourism sectors is far from reducing the relevance of Fordist standardised products in a new flexible specialization scenario. The main consequence is the need for relevant innovations in management strategies and in operator education. From a demand side point of view the tourists are more and more *prosumers* and marketing or e - commerce strategies need a new coherence and quality standards that are now generally underdeveloped, e.g. limiting the expansion of the on line reservations. Collaborative strategies are needed to face this evolutionary phase and to support a destinations long-lasting relevance on the international tourism market.

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Introduction

Tourism as other industrial sectors of the global economy has been affected by some structural innovations in the production and consumption practices during the last 30 years. A process of change supporting the transition toward a new phase of capitalist development, generally seen as originating during the mid 70’s oil and economic global crisis. The debate is not new and is essentially related to the future of capitalism productive organisation.

At the same time the success of the sustainability principles creates the conditions for a different approach to this evolutionary phenomena (Bianchi, 2004; Hardy et al., 2002; Hassan, 2000). The new centrality of equity and environmental priorities in the implementation of the tourism industry policies supports an increased attention on territories rather than on destinations, on networks of tourism attractions rather than on the monoculture economies marking the traditional mass tourism destinations. Sustainability provides the background principles for the majority of the tourism diversification processes, aiming to *sustain* an enlarged seasonality, reduced impacts on the local scale and a more ethic relationship with the local communities and the territories, no more simple playgrounds for the *golden hordes* of mass tourism. As a consequence of the present-day renewed role of local communities in the development strategies the territorial marketing inspired by the Sustainability mantra statements (e.g. *greener* products, increased host and guest interaction and local communities authentic cultures discovering) represent a powerful and successful policy tool.

The tourism industry has been able in the last decade to introduce, at least in its marketing strategies, a plethora of images and products responding to the world wide acceptance of this principles. Traditional mass tourism and new niche markets have adopted this strategies being the new vocational tourisms advantaged for the agility of the organisational structure and for the negative impacts of the consolidated image of some traditional mass tourism destinations.

Post Fordist and vocational tourism.

The Post Fordism debate is largely present in the tourism literature analysis focusing both on supply structure or tourism products nature and on the other hand on the demand patterns evolution.

Others approaches to the theme have been influential on the international tourism literature. The shift from an organized capitalism regime to a disorganized capitalism (Lush and Urry, 1994) and the idea of flexible accumulation (Harvey, 1990) meaning an increased flexible working market and new production geographies, have been introduced in the reflections on tourism industry evolution during the last years. Some authors (Harvey, 1990; Ioannides and Debbage, 1998) suggest a distinction between three phases trying to individuate the main innovation stages in the tourism industry. Consequently the evolutionary process phases of the tourism industry can be individuated by the expressions Pre Fordist tourism, Fordist tourism and Post Fordist tourism.

The Pre Fordist tourism can be defined as the artisan stage of travel industry. This model lasted until the Fordist revolution of the 1950's. The operators of the sector show in this phase a little or no specific education in the tourism related themes and the family owned business especially in the hospitality and catering sectors are the base of the tourism supply. The businesses are strongly seasonal and the dimension of the hotels is generally small. The self exploitation of the owners and seasonal contracts for the employee represents the most common working force organization models. The level of flexibility of the workforce is high. Qualitative standards of the tourism services are not high being mainly family run enterprises. Technological innovation is nearly absent being for instance typical in the hotels of the Mediterranean destinations the absence of heating (Shelmerdine, 2002).

The all inclusive family holiday represent the main product of the industry being marginally developed others tourism related activities supplied by the destinations. This kind of productive organization has been typical of the tourism industry first evolution phase even if some differentiation can be individuation in the process starting point (at first in the UK resorts and generally only during the last century all along the Mediterranean Sea, with some interesting exceptions like Nice and Cannes in France or Venice and Rimini in Italy).

The differentiation process generally started after the Second World War even if elements of the Pre Fordist productive organization are still present in today's industry. Starting from the 50's a new tourist demand led to a new stage in this evolutionary process. As like others Fordist industries tourism has been providing mass products, generally identified under the label of mass tourism. The inventor of tourism packages, Thomas Cook, created in the 19th century the pioneering forms of mass tourism and the opportunity for the definitive shift from the aristocratic forms of vacation to the mass mobility of workers spending their paid holidays travelling. Some authors prefer to talk about *Cookism* rather than Fordism considering the impacts of Thomas Cook intuition of create the first tourism package. According to John Urry the idea to move large numbers of people for tourism purposes is one of the key elements (combined with mass train mobility and

photography) characterizing the modern tourist gaze (Franklin, 2001). The Fordist productive organization has been created and has supported mass tourism demand. The double social revolution of the paid holidays and of the private car diffusion has been involving more and more Western countries citizens. The sandy coasts for instance, historically marginalized by the agricultural based traditional society, reached a new centrality in the territorial reorganization produced by tourism. The Mediterranean become the swimming pool of the richer central and north European countries and in some cases created the conditions for a real seaside tourism monoculture economic structure. At the same time the tourism products differentiation started to create the conditions to a broader competition between tourism destinations in order to attract international tourism flows. We can identify some main elements of the Fordist Mass tourism industry (Table 1).

Table 1: Fordist, Post Fordist and Neo Fordist tourism characteristics.

<i>Fordist tourism</i>	<i>Post-Fordist tourism</i>	<i>Neo-Fordist tourism</i>
Mass Tourism	Specialized/Individualized/ Customized Niche Market Tourism	Niche Market Mass Tourism
Inflexible/Rigidity	Flexibility	Flexible Specialization
Spatially Concentrated	Shorter Product Life Cycle	
Undifferentiated Products	Product Differentiation	Product Differentiation
Small Number of Producers		Continuity of Fordist Structures/Institutions
Discounted Product		
Economies of Scale	Small Scale or 'Small Batch'	Mass Customization
Large # of Consumers	Consumer Controlled	Consumer Choice
Collective Consumption	Individualized Consumption	
Undifferentiated Consumers	'Better Tourists'	
Seasonally Polarized		
Demand Western Amenities	Rapidly Changing Consumer Tastes	
Staged Authenticity	Desire Authenticity	Desire Reality While Reveling in Kitsch
Environmental Pressures	'Green Tourism'	
'McDonaldization' or 'Disneyfication'	'De-McDonaldization'	Flexible/Specialized 'McDonalized' Product

Source: Torres, 2002.

Torres resumes the key points of the debate (Torres, 2002) comparing Fordism, Post Fordism and Neo Fordism. Between the main characteristics the presence of a small number of producers, generally the transnational Tour Operators corporations. The market is controlled by producers rather than consumers. As a consequence, the productive system is characterized by rigid standardisation on a large scale in order to support economies of scale. The result of this productive model is a large impact on the market of packaged travels and the capacity to supply low cost products to a large clientele. The number of tourists choosing those products is a relevant variable being the mass nature of the tourism products the only way to face the continuously reducing profit's margins of the packages tour sold. The protagonists of this evolution have been the international travel companies starting operating after the Second World War. The international tourism firms drive the shift from Pre Fordist productive forms to Fordism. The main characteristics of the new phase are the international development strategies finalized to obtain new markets shares, the concentration processes to support economies of scale leading to an oligopolistic sector structure involving hotels chains, airlines and tour operators. Technological innovations in air transport sector (like new four-engine planes with pressurized cabins) represent one of the driving forces of the new tourism industry organization. The result of the introduction of all this innovations is a new approach to tourism production and marketing based on highly standardized packages and on a standardized destination's supply by mean of franchising contracts (Löfgren, 1999). The main protagonists of this internationalisation of the industry are based in the origin countries of the principal tourism flows notably Western European countries and North America.

In the late 1980s, out of around 670 British travel companies, just two (Thomson and the International Leisure Group) controlled more than 53% of the market. In the first half of the 90's the first five globally leading airlines controlled over the 80 % of the market (Ioannides and Debbage, 1998). At the same time vertical integration between the different sectors of the industry shows some difficulties even today mainly for the high volatility of the sector profits.

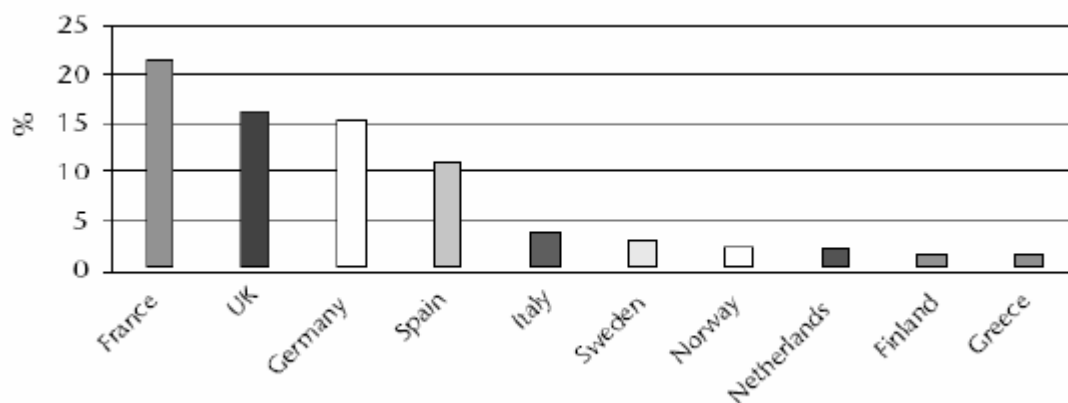
The third phase of the tourism industry evolution has been defined as Post Fordist or in a more correct way Neo Fordist. In fact is possible to individuate in the contemporary tourism productive organisation characters that can be addressed to each of the third phases described being impossible to definitely create a distinction between the industry evolution phenomena. On the other hand it's true that starting from the 1975 international economic crisis the world industry and tourism industry too, knew a reorganization phase leading to some interesting innovation we can observe today. The main innovation forces have been the introduction of the Information and Communication Technologies and more generally the new relevance of a key concept for the

productive organisation of the tourism industry, notably *flexibility* principle (Milne and Ateljevic, 2001; Harvey, 1990).

In Europe for example the diffusion of the ICT's is rapidly growing even if the percentages are still reduced (3,6 of the travel market in 2002 with the air travel sector representing over 60 % per cent of the total). What is interesting is the analysis of the growth rates for the online travel market forecasted by the EU Commission for 2006 in about 120 % growth rate compared to 2002 results. Even if the percentage of people booking on line has been still low in 2002 (around 20 %) is easy to imagine a broader diffusion of the web to have access to tourism services in the future. The working force is more and more dependent from temporary contracts, outsourcing strategies has been introduced also in the international tourism companies even if the peculiar nature of the tourism products strongly dependent on the quality standards of the services provided have limited the delegation of high specialised services (EU Commission, 2004).

The EU tourism system shows some peculiar characteristics in its evolutionary patterns. The consolidated tradition of the sector (around two centuries of hospitality history in the pioneering UK destinations) contributed to increase the complexity of the productive models being strongly interrelated more then in other part of the world elements of Pre Fordist, Fordist and Post Fordist organisational patterns. Tourism impact on the EU economy has been evaluated in a range from about 4 % (tourism industry in a restricted sense) to about 11 % (tourism economy). In such a relevant sector the role of Tour Operators is reduced, representing with travel agencies less than 3 % of the sector enterprises. Figure 1 shows the relevance of the Tour Operators in some EU countries hotel sector.

Figure 1: Hotel sector, percentage share of hotel chains rooms in some EU countries.



Source: EU Commission, 2004

In no EU country hotel chains represent more than some 20 % of the room capacity. Some 99 % of the tourism sector enterprises are SME's, most of which (micro-enterprises) employ one to nine persons. About 97 % of enterprises in the tourism industry belong to the hotel, restaurant and café sector (EU Commission, 2004).

Mass tourism products seems concentrate today the typical characteristics of the Fordist system, notably standardization and low flexibility of the package, economies of scale, oligopoly competition in the international market by the dominance of Tour Operators products. Some authors, starting from Poon's book thesis (Poon, 1993) define with the expression *new tourism* the emergence of a new phase in the tourism industry organization. Standardized, low - flexible products, mass consumption and spatial concentration in opposition to *new tourists* travelling alone or in small groups, showing a new attention to local communities culture and choosing individualised, green tourism products. A new responsible, sophisticated and looking for customized personal experiences tourism demand is growing showing a new attitude toward consumption patterns based on nature conservation and sustainability principles.

Another definition, Neo Fordism, has been proposed by Ioanniddes and Debbage (1998) quoting Malecki (1995). They classified the various degrees of flexibility in institutions and organizational mechanisms of the pre Fordist and Fordist travel industry, aiming to demonstrate that any attempt to create a rigid classification of evolutions patterns in the travel industry can lead to unrealistic analysis of the existing productive forms.

From undifferentiated tourism products to Mass customization.

The mass nature of Tour Operator products generally lead to the production of undifferentiated tourism products, supported by the international hotel chains and brand franchising. Built environment, customer relationships strategies and entertainment activities are standardised. The resort is the core structure of this model being all the productive variables managed under a centralised control. But the tourism resort model involves also the spatial and temporal concentration of tourists activities and experiences, creating tourists *enclaves* (Edensor, 2001) with relevant impacts on the environment (increased pressure on carrying capacity limits) and on local communities life. Some interesting observation can also be addressed to the consumption patterns in a Fordist tourism model. The first remark is related to the mass nature of a tourism system. It implies a mass clientele but also collective consumption patterns marked by standardized products for an undifferentiated clientele. One of the most successful definitions of this process is John Urry's idea of tourist *gaze*.

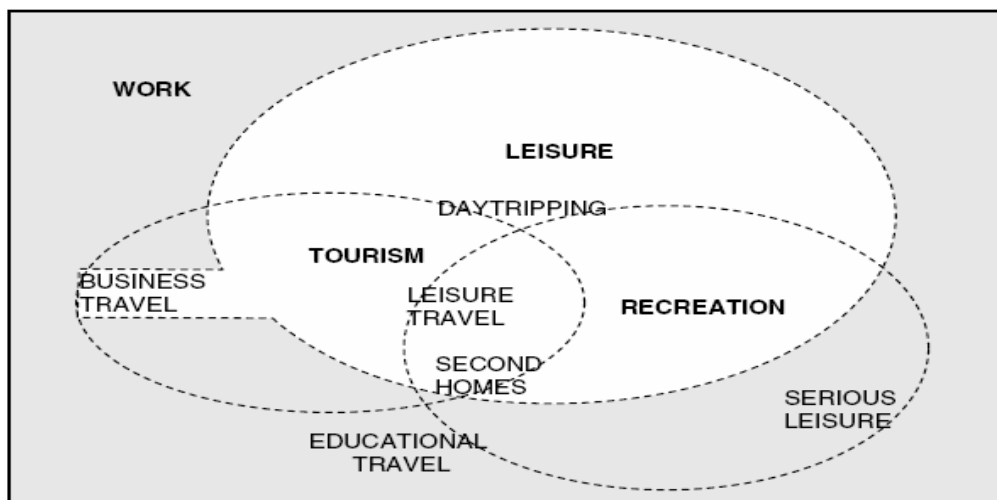
Tourism space is created by marking the tourist experience with collective spaces, activities and emotional experiences. The tourist gaze idea is strongly related to mass tourism because of the characteristics of the spatial and temporal experience generating the *gaze*. A large number of people, a spatial and temporal concentration, and undifferentiated experiences are the mass tourism factors marking the tourist's products reality. The main consequence of this process is related to the idea that mass tourism resorts can reply familiar consumption patterns in tourist's experiences even without any relationship with the local built and immaterial environment, including local communities. The consequent creation of tourism *enclaves* or *bubbles* has been successfully described by the Dean Mac Cannel idea of *staged authenticity* (Mac Cannel, 1973; 1976). In its well known book *The Tourist* he faces the point of the nature of the tourist experience and introduce the idea of the search for authenticity as one of the basic motivation of the voyage and at the same time the staged nature of the experience the tourists live in their journey.

More recently mass tourism consumption experience has been linked to the ideas of a *McDonaldization*, *Disneyfication* or *McDisneyfication* of societies (Ritzer, 1998; Ritzer and Liska, 1997). The main idea linking those theories is the process of homogenization and standardization of culture on a global scale, under the impact of dominant patterns of consumption spread by transnational corporations symbolically represented by Mc Donald's and Disney's world wide diffusion. This process has been seen as one of the main characteristics of the Fordist tourism leading to a reduction of the cultural diversity by mean of the demand of a tourist experience that will be more and more reproducing the every day life patterns of consumption. The idea of a change in capitalistic production patterns has been more and more supported in the academy during the 90's. Following the success of Harvey's thesis on Post Modern cultural changes (Harvey, 1990) some authors support the idea that a radical shift in the capitalist productive system is taking place leading to Post Fordist pattern of production, mainly characterized by an increased flexibility in both the production and consumption processes. Global economy trends, marked by the transnational corporation's success and the phenomena defined as part of the economic *globalisation* processes is determining a change in the productive system but also in the consumption patterns with a move from the Fordist collective and undifferentiated consumption to the need for more individualized and customized products. The same concept of tourism is more and more flexible (figure 2). The new centrality of the reflection on mobility patterns is a consequence of the increased integration between different forms of mobility including tourism, leisure and work activities (Lew, Hall and Williams, 2004).

Tourism industry follows those tendencies. The specialization of tourism products create the conditions for the development of relevant niche sectors and is one of the consequences of the

change in consumption patterns. The *new tourism* and its manifestations (from ecotourism to *dark tourism*) show the result of this cultural changes and their influence in determining renewed tourists needs.

Figure 2: The complex relationships between contemporary mobility patterns.



Source: Lew, Hall and Williams, 2004.

Consumers seem to start obtaining more power in influencing the market tendencies. Flexibility both in the supply and the demand side seems to be the key concept of the Post Fordist evolution. The new centrality of consumption patterns doesn't mean that the production side of the tourism industry is not affected by the change. The flexibility idea is the new managerial *mantra* in the sector, leading to some interesting change in the hotel and resorts management patterns. Demand side evolutions at firsts created some difficulties in realizing economies of scale and in supplying large scale mass tourism packages. This change also tend to meet the new demand for environmental friendly tourism products, being new tourists generally perceived as more educated, interested in local communities culture and in a real interaction with the surrounding environment. The concept of *authentic* (Mac Cannell,1976; Chhabra et al., 2003) has a new centrality looking the new tourist for a real experience of the other, especially if referred to different cultures.

The idea that Fordism and Post Fordism tourism represent two different forms of productive systems has been criticised (Torres, 2002; Ioanniddes and Debbage,1998). The strict opposition between the two periods create the condition to ignore social, geographical and temporal variables affecting such a reorganisation of capitalism. The second criticism is related to the adoption of the idea of flexibility as a synonymous of Post Fordism. Fordist tourism industry as been able to

introduce relevant innovation in the productive system based on the idea of flexibility. The package tour for example are no more rigid and inflexible products but elements of customization and individualization have been introduced in mass tourism products, leading to a continuous success of package in contemporary tourism market. Niche tourism products can be sold as like mass tourism products supplying high specialized and customized packages to a large number of tourists. We can define this process as Mass Customization, meaning the tendency of the tourism industry to react to the demand for individualized and customized products by introducing new products (and new productive patterns) in the tourism supply. Neo Fordism is the definition adopted by the authors supporting the idea of continuity between Fordism and contemporary productive forms marked by flexibility. The end of Fordist Mass tourism seems to be an unrealistic prevision showing the sector a relevant capacity to innovate the productive models. A different scenario can be imagined for tourism destinations. The difficulties in introducing innovation actions and at the same time in facing social and political local pressures can probably represent a crisis factor in the innovation process.

The reorganization processes involving the tourism industry produce new hierarchies in the international tourism destinations market. Analysing some traditional mass tourism destinations life cycle (mainly coastal ones but also some consolidated winter sports destinations) we can observe some common strategies in the attempt to support an increased international competitiveness. The first phase of those strategic policies is generally an attempt to limit the effects of seasonality. In the traditional Mediterranean coastal destinations seasonality has been probably the most relevant characteristics of the tourism development, supported by the national and international demand for 3's tourism resorts (Bramwell, 2004). The shift from the traditional Mediterranean polyculture economy to the tourism monoculture in several coastal areas has been driving a new seasonal cycle in economic activities.

The farming calendar and the transhumance once marking the relationships between people and land has been replaced by a new seasonality

“... Driven not by the needs and life-cycles of livestock but by the dispositions and demands of northern European tourists coming and going from the region in the summer months.” (Selwyn, 2000).

The holiday's season has been traditionally determined by school and industry summer closing. From a demand side point of view what can be observed as typical of the Fordist productive organisation are the social meanings related to the holidays time. On the one hand we

can consider as the main finality of the paid holidays institutionalisation the *regeneration* of the industrial workforce by mean of the combination of the week end holidays (creating at the same time a new consumption time) and of the summer paid vacations that coherently with the original Latin word *vacatio* provided an empty period of time. During this free month the traditional tourism destinations have been representing the perfect framework to regenerate the workforce providing an all inclusive supply and creating the condition for the family holiday.

On the other hand in the Post Fordist and Post Modern societies we can note that more and more the everyday occupation is no more representative of a status like in the past but is the opportunity to provide time and resources to realize everyone attitudes. Our tendency to represent ourselves as part of groups or as someone prefer to say *tribes* has changed our approach to holiday time representation. A shift from a *vacatio time* to the new vocational tourisms¹ is involving a increased interaction of the tourist with the tourism product, shaped according to the preferences of consumers. Furthermore the tribes identification is no static, being common for the same person to choose multiple adhesion to different identities and demanding different tourism products and destinations (Cova and Aubert - Gamet, 1999; Maffesoli, 1996).

In Italy for instance Rimini and Jesolo started developing a mass tourism industry mainly as a consequence of the institutionalisation of the paid holidays and the consequent stop of the industrial productive system in August's months in combination with industry and schools vacations. As a result tourism becomes a status symbol even for the North Italian industrial workforce. The creation of a holiday social need related to the whole year working activities cycle has been not only an important variable but probably the starting point of the same idea to develop a mass tourism sector in the High Adriatic coast, being the tourism demand the driving force of the new holiday sector. The well known image of tourists knocking on the doors looking for rooms to rent in Rimini during the 50's, clearly represent the definitive passage from elites tourism to a new working and middle class holidaymakers clientele. The tourism season once seen as the core resource of the whole economic cycle in seaside tourism monoculture economies, started to be a relevant issue in the moment that the peak season was no more synonymous of sold out.

In Rimini and Jesolo during the 80's the effects of the stagnation phase have been clearly perceived by decision makers and operators of the sector. The first attempt to innovate the traditional supply based on the 3's products followed the need for increased quality standards and to provide new tourism attractions. What has been clearly observable in this first phase has been the creation of tourism products supporting the traditional supply based on the summer season

¹ On this theme can be interesting to see the activities of the *Scuola Superiore del Loisir e degli Eventi di Comunicazione di Rimini* (under the direction of Andrea Pollarini). Recent projects based on the use of Memory in a broad sense to support tourism marketing has been implemented by the institute. See <http://www.scuolasuperioreloisir.it>

variables. The beach still remained the core asset of the local supply and some new attractions like theme parks or marinas tried only to extend the summer season.

New products have been promoted or old ones innovated but without involving a radical change in tourism industry assets. Being the mass tourism generally followed in coastal destinations by a monoculture economy the very relevant issues has been to create a broad consensus on the new development strategies for local economies. In the passage from *destination tourism* to *motivation tourism* the centrality of the destination tend to be overcome by the need for integrating tourism products in the whole territories development strategies. The same 3's undifferentiated products are more and more associated to new products shaped on the surrounding territory *vocations*. Niche tourisms find in this new development phase the ideal conditions to be developed and territories identities rhetoric is now one of the core conceptual frameworks of tourism diversification.

Urban planning is at the same time a relevant conflict area being the traditional tourist city organized around the hotels – beach monoculture supply. Tourism diversification involves also a new spatial organisation supporting new tourism attractions centrality. As a consequence of the traditional perception of the tourism industry as a low impact sector, management and planning practices has been traditionally poor in the tourism sector. The term *boosterism* introduced by Getz (1987) identifies the traditionally dominant tourism planning attitude ignoring the relevant complexity of the issues related to tourism development. As a result of the adoption of tourism *first* attitude (Burns, 2004) economic benefits evaluation generally leads to underestimate negative impacts on local communities and the surrounding environment. Most of the impacts perceived as critical issues for contemporary coastal destinations are related to effect of this unplanned development. In Rimini for example a recent survey analysing antitourism manifestations in the city shows how the local community perceive contemporary tourism development as increasingly negative for the lack of tourism planning and management strategies in the municipality policies (Trademark, 2001).

Consequently tourism diversification and decision making processes are strongly related, the policies makers having to manage conflicting interests. The introduction of a new seasonality affects the consolidated *status quo* of the interest's network supporting the tourism monoculture. Traditional coastal destinations for instance are no more able to satisfy the new tourisms demand without a new vision aiming to integrate the summer city with the surrounding territories. The new enlarged season creates the conditions to reduce the impacts of the seaside tourism monoculture and to integrate tourism economies with local development policies on a larger scale. New Public Authorities working on the provincial scale seems to represent the more successful political

framework to support this process. Is the case for instance of the *Provincia di Rimini*² is nowadays promoting the most relevant actions to create a broader tourism supply in the area (see Conti and Perelli, 2004). Territories identity and sustainability are the key words of this process.

New tourism means also new management strategies. The passage from the undifferentiated seaside tourism products to the enlarged season products of the tourism diversification phase need mainly increased quality standards in tourism services and operators education processes. The next step leading from an enlarged seasonality to a real tourism diversification involve a deeper evolutionary process in the marketing and management strategies.

The consumer role seems to be more and more corresponding to the Alvin Toffler idea of *prosumer* (Toffler,1980). The process of integration between the production and consumption functions shows particularly relevance in the so called alternative tourism sector where the tourism product is characterized by high levels of customization. But also traditional tourism protagonists like cruises adopt strategies trying to respond to this process. In the Aquarium of Genoa the cruise line Costa is financing a project of education and entertainment called *Costa Edutainment* supporting its products by interactive activities leading the visitor to discover the marine environment. The distinction between production and consumption tend to be reduced by the new centrality of the tourists in organizing, contracting and shaping on its own need the tourism products. ICT's represent the basis of this process and the challenge for the traditional tourism supply is more and more complex. Firstly for the higher level of integration at the destination level between the different variables modelling the local tourism supply. The advantages of an efficiently working supply network can be minimized by few single operators that are not able to introduce high quality standards in innovations introduced. Hotels that chose to market their products by mean of a web page but without accepting the consequent task to answer to request of information sent by e-mail are one of the most common examples of this kind of innovation strategies failure. At a larger scale the destination marketing strategies can introduce the web as a powerful marketing tool but at the same time the need to integrate the different web pages promoting a destination can not be ignored. To promote a coherent destination image need a high level of coordination. The majority of the web pages are conceived as a simple addition of *single* tourism products or single tourism destinations promotion but are very few the web pages trying to create a *network* of alternatives allowing web customers to build is own tour package.

² The same Province is supporting an international project aiming to integrate sustainability issues and vocational tourism. The project is called *SuVot* and the implementation phase started in January 2005. See <http://www.turismosostenibile.provincia.rimini.it> for more information on the project and the activities of the network.

The need for sure qualitative standards for the new niche tourism sectors products interestingly lead to a new centrality of traditional organisational characteristics of the Fordism tourism. The emerging sectors even supporting a rhetoric centrality of individuality have to reintroduce standardization processes to support the passage from an elite tourism niche to an economically viable tourism sector. Even the responsible and sophisticated *new tourist* will find very difficult to imagine its own customized personal tourism experiences without the effective introduction of standardization elements in the new tourism supply.

In this evolving scenario the brand is more and more a guarantee of quality and the need for stronger image branding strategies is a basic priority. The niche nature of the new tourism sectors imply marketing strategies focusing on *tourists tribes* sometimes very differentiated and no more satisfied by the traditional undifferentiated product marketing. The most challenging task in this process is destination branding. The complexity of the stakeholders involved in the process justifies the difficulties in implementing effective destination branding policies.

The ecotourism case can illustrate the complexity of this phenomenon. Originally born as a very specialized sector today represents a very important share of the market and the same nature of the ecotourism activities is today controversial (Blamey, 2001; Acott et al., 1998). Similarly niche sectors like the adventure tourism or the extreme sports products show a common tendency to pass over the pioneering phase by mean of introducing Neo Fordist organisational patterns. A very interesting example is provided by the network of the *Le parcours d'aventure*³ in France. At the moment around 400 Parks are associated to the National Body coordinating the sector. Those attractions at first represented a small niche experience of tourism diversification in the inland regions of France, most of the time marked by a strong winter based peak season. During the last year the success of this sport tourism activities in the Hautes Alpes Region (figure 3) is now creating the conditions to a radical reduction of the tourism seasonality providing an interactive tourism experience largely appreciated.

What is interesting to consider is the common tendency to transform niche ideas in very common tourism products. As showed by Ioannides and Debbage (1998), the tourism industry innovate its productive organisation by adopting flexible strategies and creating the condition to support mass tourism products in the former niche sectors. The success of this strategy is mainly related to the accessibility of the destinations still representing one of the conditions to develop a *mass niche* destination.

³ *Les parcours d'aventure* are sport attractions inspired by the military experience generally providing tree climbing experiences by mean of mobiles bridges connecting the trees in a forest. *Le parcours d'aventure* appeared for the first time in France in 1995 for the initiative of a retired soldier. See <http://www.foret-aventure.com>, a network of Adventure Park in Europe or <http://www.goape.co.uk>.

Figure 3: Parcours d'aventure and Accrobranche sites in the Hautes – Alpes Region (France).



Source: <http://www.hautes-alpes.net>.

An interesting characteristic of the new sectors is the opportunity of growth for small and medium enterprises sector, sometimes introducing in the market small Tour Operators creating very high specialized package tours. As a consequence the needs for an authentic experience, a green and alternative holiday are reintroduced in traditional productive patterns. Neo Fordism definition seems to be the most effective synthesis's expression representing this tendency.

In the case of *Le parcours d'aventure* in France this process of integration of a niche sector in the main stream of the national tourism supply is creating the condition for the creation of a new niche approach to this sport, generally called *Accrobranche*⁴. Can be interesting to note that the movement identified by this name is trying strongly to reduce the possibility to evolve from a niche sport tourism group (or a tribe) to a consolidated tourism sector. In the official web page of *Accrobranche* the group defines its finality in opposition to *Le parcours d'aventure* experience and clearly underlines the *movement* nature of the network. The *Accrobranche* movement supports the diffusion of an International Tree Climber Charter stating the rules for tree climbing in security and

⁴ See <http://www.accrobranche.org>

respecting the trees (a collaboration with the specialists of the University of Montpellier produced a code of conduct avoiding to destroy the trees). A signal of the members consciousness of the tourism sector capability to create new products taking inspiration from elite movements and activities, even if a certain antitourism distance from mass activities seems readable in this approach.

The tourism economy is more and more dependent by the ability of the operators and of the decision makers to implement tourism networks (King, 2002; Buhalis, 2000). Being the

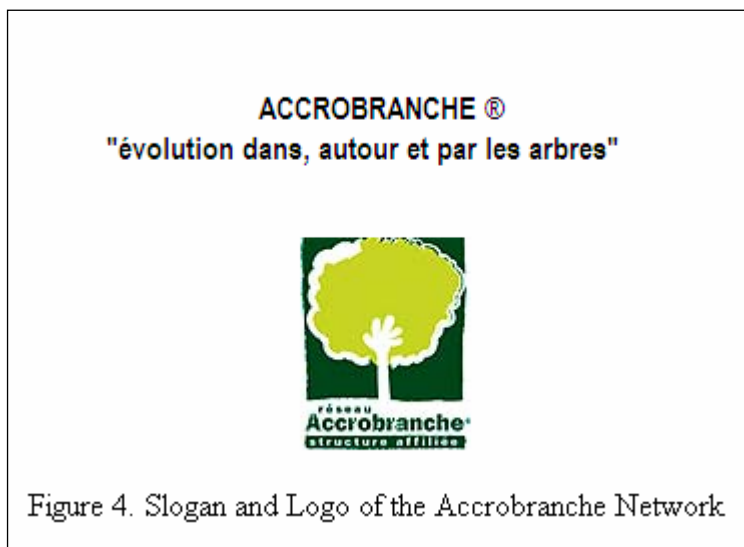


Figure 4. Slogan and Logo of the Accrobranche Network

nature of the *experience* and no more the characteristics of the destination the key of the success of a territory, collaboration between the stakeholders is the only way to create the condition for a long-lasting positioning on the tourism market. The traditional limitation conditioning tourism strategies (e.g. political boundaries) are progressively losing relevance. In Rimini case for example some municipality of the confining Regione Marche has been involved in the promotion of inland tourism by the Rimini Province. It's interesting to note that both the Rimini and Urbino Provincial tourism authorities are now supporting the adoption of *neutral new brands* (respectively Signoria dei Malatesta and Il Montefeltro) without direct connections with the traditional tourism image of Rimini. The weight of the seaside tourism tradition of Rimini is perceived as not useful in supporting new tourism territories and new tourism brands.

Conclusions

The evolution in the organisational forms of the tourism industry is now marked by an interesting attention to the creation of network of tourism attractions, especially in the areas marked by a traditional mass tourism. The shift from a destination to a motivation tourism consequently involve new tourism territories, being the traditional tourism destinations no more able to face the new demand for more individualized and flexible tourism products. This process is sustained by the consolidated impact of the principles of sustainability that can be considered at the moment as a common framework of the tourism diversification processes.

The new centrality of consolidated attraction or the birth of recent tourism vocation are more and more underlining the need for new marketing and management strategies. The shift from tourist poles supply to a network of attractions, even if supported by the ICT's innovations need the adoption of new strategies based on a high level of collaboration between the stakeholders involved. The nature of the tourism industry that shows at the same time elements of Pre Fordist, Fordist and Post Fordist organisational patterns, increases the level of complexity of this process. Far from create the conditions for a radical shift in the organisational patterns of the international tourism industry, these evolutionary processes seems to affect more effectively the demand side that shows an interestingly orientation toward new individualized tourism products. The creation of this products support the emergency of new protagonist of the local development phenomena and generate at the same time new tourism sectors, rapidly integrated by the tourism industry in the mass customized products supply.

The new challenge for the decision makers of the tourism sectors seems to be the choice between supporting the traditional mass tourism activities or creating the conditions for the development of a new local tourism supply. The increasing relevance of the local authorities in Europe for instance on the one hand create the conditions to implement policies answering to the local communities priorities. On the other hand the increasing level of complexity showed by the tourism sector required the adoption of shared strategies on a large scale, being the network dimension the core point of effective tourism policies. The evolution of the industry, the success of the sustainability rhetoric and the new centrality of the tourists as *prosumers* create the conditions for a new centrality of the public authorities intervention, both with planning tools and implementing shared strategies on the large scale. The time for *boosterism* seem to be really up.

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