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New Challenges in Tourism Management: Qualitative and Exploratory Approaches

TECHNICAL INFORMATION

Authors:
Artur Fernando Arede Correia Cristovão
Dália Guerreiro
Dília Cristina dos Santos Rafael Nunes
Joana de Carvalho Folgado Lessa
Leonardo Xavier da Silva
Marcelino de Souza
Maria Isabel Roque
Tissiane Schmidt Dolci
Vander Valduga

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PLASTIC USE SUSTAINABLE CHANGE IN PORTUGAL: AN ANALYSIS ON TOURISM STAKEHOLDERS' ACTIONS AND PROGRAMMES

Dília Cristina dos Santos Rafael Nunes[1]
Joana de Carvalho Folgado Lessa[2]

ABSTRACT

Studies indicate that 80 % of all Tourism in Europe is held in coastal areas. In Portugal the number grows to 90 %, a fact that raises two distinct but equally relevant types of concerns: on one side the pressure for maintaining the shorelines and beaches clean and aesthetically appraisable for visitors, and on the other side, the potential massification of tourism that stands on the opposite end towards preserving the environment of tourism locations. This study focuses on the relevance of the oceans' preservation for the tourism sector in Portugal, specifically in the Algarve, and on how sustainability is being addressed regarding plastic use and its negative outcome, particularly marine litter and the damages it inflicts on coastal areas. The methodology adopted was literature review and case studies analysis of a set of governmental, non-governmental and private tourism sector stakeholder's actions and programmes. Findings suggest that the promotion of circular economy is a path several organizations are already undertaking in order to address plastic use towards a more sustainable planet and Tourism development. Results also indicate that Design is an important facilitator for the change of the tourism sector towards this new circular economy model.

Keywords: Coastal Tourism, Design and Circular Economy, Portugal, Sustainability, Marine Litter, Oceans' Preservation.

JEL Classification: Z3, Z32, Q01, Q5

1. INTRODUCTION

Tourism is defined by the United Nations World Tourism Organisation (UNWTO) "as a social, cultural and economic phenomenon, which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which involve tourism expenditure" (UNWTO, n.d.-b).

According to the UNWTO, which oversees short-term tourism trends regularly to provide global tourism stakeholders with an up-to-date international tourism analysis, 2019 was another year of strong growth, although slower when compared to the exceptional rates of 2017 (+6 %) and 2018 (+6 %) (UNWTO, n.d.-a). This was mainly identified in advanced economies, particularly in Europe, to which contributed the Brexit process, geopolitical and trade tensions, and the global economic slowdown. 2019 was also the year of major shifts

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[1] University of Algarve, Faro, Portugal (a65426@ualg.pt)
[2] University of Algarve, Faro, Portugal (jlessa@ualg.pt)

for the tourism sector, with the collapse of Thomas Cook and several low-cost airlines in Europe. Nevertheless, based on trends, economic prospects and the UNWTO Confidence Index (UNWTO, 2020a), a growth of 3 to 4% in international tourist arrivals worldwide in 2020 was forecasted.

However, the current Covid-19 pandemic dramatically changed these projections, as Tourism has been one of the most affected economic sectors worldwide, with 60 to 80% possible falls in international tourist numbers, according to the most recent UNWTO report (UNWTO, 2020b).

The number of tourists travelling across borders was expected to reach 1.8 billion a year by 2030 (UNWTO, 2020a), alongside a further 15.6 billion domestic tourist arrivals. Such growth would bring many opportunities, including socio-economic development and job creation. However, at the same time, the impacts of tourism-related transport were continuously rising, challenging the sector's ambition to meet the targets of the Paris Agreement (UNWTO, n.d.-a).

The Covid-19 pandemic will certainly bring new developments to the relationship between tourism and the environment, as governments and international agencies such as UNWTO appeal to the responsible regeneration of the sector. In recent declarations, UNWTO Secretary-General Zurab Pololikashvili stated that Tourism must "continue to promote innovation and sustainability. These must no longer be small parts of our sector, but instead must be at the heart of everything we do. This way, as we restart tourism, we can build a sector that works for people and planet" (UNWTO, 2020c).

António Guterres, the secretary-general of the United Nations (UN), recently stated that although tourism is among those sectors being affected most severely by the Covid-19 pandemic, it is an essential pillar of the 2030 Agenda for Sustainable Development and can be a platform for overcoming the pandemic crisis. He encourages "all those involved in the tourism sector to explore how we can recover better, including through climate action and other steps that advance sustainability and build resilience" (UNWTO, 2020d).

Therefore, present circumstances, although challenging, may be ideal for creating and implementing new Design-based strategies for the tourism sector, in order to make a shift towards a more sustainable and healthier planet. This work intends to study the relevance of the oceans for the tourism sector by analysing two aspects: the importance of oceans' preservation for coastal tourism; and how sustainability is being addressed by coastal tourism companies and government agencies operating in Portugal, when it comes to plastic use, specifically in the region of the Algarve.

2. LITERATURE REVIEW

2.1 Coastal Tourism

Coastal areas are some of the most productive and biologically diverse on the planet. According to the UN (UNEP, n.d.-c), 37 per cent of the world's population lives within 100 km of the coast, a fact that makes them densely populated and heavily pressured areas. On top of this, 80% of all tourism takes place in coastal areas, with beaches and coral reefs amongst the most popular destinations (WWF, n.d.).

Coastal tourism refers to land-based tourism activities such as swimming, surfing, sunbathing and other coastal leisure, recreation and sports activities, which take place on the shore of a sea, lake, or river. Hence, proximity to the coast is a necessary condition for services and facilities to support coastal tourism (UNWTO, 2019). Recognized as one of the most important economic activities of coastal areas worldwide, tourism has a positive impact on social and economic indicators such as employment and revenue generation.

However, seasonal and spatial tourist's concentration has serious implications on resource management and environment protection, because development purposes and increased tourism in coastal areas, impact the physical environment and biodiversity, increases rates of erosion, damages coral reefs, and destroys mangroves, among other concerns (Blue Flag, 2006).

These concerns were evidenced in a study conducted in 2016, where Danish coastal areas (protected from tourism development and construction for over 80 years), were relieved of these restrictions by the government and tourism-related projects were invited to be made within these areas. The study concluded that overall proposals had an emphasis on economic growth, with no long-term perspectives and scarcely knowledge or reference to sustainability as a holistic concept (Andersen et al., 2016).

Tourism is both highly vulnerable to climate change and a massive contributor to it. On one side, threats for the sector are diverse, with direct and indirect impacts such as more extreme weather events, water shortages, safety concerns and increased insurance costs, biodiversity loss, damage to assets and attractions at destinations, among others (UNWTO, n.d.-a). On the other, when "much of the plastic used in tourism is made to be thrown away and often can't be recycled" (One Planet Network, n.d.), and around 80% of all tourism taking place in coastal areas, the sector is greatly responsible for the pollution and damages its activities cause to coastal areas among other natural habitats.

It is, therefore, vital to protect the marine environment while fostering coastal tourism. And to accomplish this goal, it is imperative that all stakeholders take responsibility and actively cooperate. Whether this is achieved through the establishment of laws, imposed by governments and public organizations, or, through a mix of public and private tourism decision-makers rules, directives or good practice guidelines, the purpose remains unaltered.

In Portugal, concerning the year 2018, statistics show that the number of non-resident tourists arriving reached 22.8 million (INE, 2019), and that coastal areas concentrated 84.8% of total overnight stays in the country. The region of the Algarve (south of Portugal) had 35,3% of the market share, which makes it the region with the highest number of tourists for coastal tourism (INE, 2019).

2.2 Climate Change

The First World Climate Conference held in Geneva in 1979 with the participation of scientists from 50 nations worldwide, stated that it was urgent to act upon the way society and governance were evolving, because the predictions of climate change were already alarming, at the time. The Rio Summit in 1992, the Kyoto Protocol in 1997, and more recently, the Paris Agreement in 2015, all continued to reinforce scientists' warnings on the emergency for immediate action to mitigate climate change.

A worldwide coalition of over 11,000 scientist signatories, led by William Ripple and Christopher Wolf, renewed the message in their article "World Scientists' Warning of a Climate Emergency". They reinforced that the climate crisis is closely linked to excessive consumption of the wealthy lifestyle and that the most prosperous countries are mainly responsible for the historical Green House Gas emissions and generally have the greatest per capita emissions. It is their understanding that policymakers and the public, need urgent access to a set of indicators that convey the effects of human activities on Green House Gas emissions and the consequent impacts on climate, nature and society. They concluded that these key indicators were Energy, Short-lived Pollutants, Nature, Food, Economy, and Population (Bioscience, 2020).

This work focuses on the Nature key indicator, where scientists believe that the protection and restoration of Earth's ecosystems can reduce up to a third of the carbon emissions needed by 2030, according to the Paris agreement.

The 2030 Agenda for Sustainable Development and its' 17 Sustainable Development Goals (SDGs), also consider an utmost priority the promotion of actions and measures that combat climate change and preserve our oceans and forests (UN, 2019).

In line with these views are the latest reports of the Intergovernmental Panel on Climate Change (IPCC), that predicted climate change to greatly affect marine, freshwater, and terrestrial life, from plankton and corals to fishes and forests (IPCC, 2018). As this study emphasizes coastal areas, the preservation and protection of the marine ecosystems is of greatest importance, and mitigating climate change while honouring the diversity of humans, entails major transformations in the ways our global society functions and interacts with natural ecosystems (Scientists Warning, 2020).

Climate change impacts ecosystems and their goods and services, threatens key cultural dimensions of lives and livelihoods. The ocean is the home of the largest continuous ecosystem, provides habitats for rich marine biodiversity, and is an essential source of food. It also supports other services to humans such as Tourism, where the aesthetic appeal of the ecosystem is a key element. Governance of the ocean has a unique set of challenges and opportunities and requires different treatment under a changing climate (IPCC, 2014).

2.3 Marine Litter

UNEP defines marine litter as "any persistent, manufactured or processed solid material discarded, disposed of or abandoned in the marine and coastal environment. Marine litter consists of items that have been made or used by people and deliberately discarded into the sea or rivers or on beaches; brought indirectly to the sea with rivers, sewage, storm water or winds; accidentally lost, including material lost at sea in bad weather (fishing gear, cargo); or deliberately left by people on beaches and shores" (UNEP, 2005: 3).

A study that analyses marine anthropogenic litter in Portugal, conducted over a two-year period (2011−2013) in eleven beaches along the Portuguese coast, concluded that of all collected litter items, 99% were plastic and 68% were microplastics. In this study, marine anthropogenic litter items were found in all surveyed beaches. Results suggested that microplastics have predominantly a land-based origin and that they were deliberately discarded or accidentally lost in watercourses and/or coastal areas (Antunes et al., 2018).

Another study regarding the type of marine litter found in submarine canyons off the west coast of Portugal, evidences that 86% of all marine litter found in three of these canyons was plastic sourced. Findings also suggested that the majority of the plastic litter was land-based, as it was most abundant at sites closest to the coastline and population centers (Mordecai et al., 2011).

This data coincides with the findings of Schmidt et al, which points that plastic pollution of freshwater systems, particularly rivers, and of the marine environment are linked because rivers ultimately discharge into the marine environment. Since land-based sources are considered to be a major contributor to marine plastic debris, and rivers connect most of the global land surface to the marine environment, scientists considered rivers to be a major pathway for plastic transport into the seas. It is also their understanding that the study's 10 top-ranked rivers transport between 88 and 94% of the total land-based plastic that ends in the sea (Schmidt et al., 2017).

This information is essential in order to establish best practice procedures, create processes and make laws that can help mitigate river and marine litter issues. Scientists believe that

awareness outreach and co-responsibility actions are needed to change behaviours in civil society (Antunes et al., 2018).

A study conducted in 2009, already reinforced these scientists' theories, and what common sense tells us: litter is primarily the result of individual behaviours. This study indicated that about 85% of littering in the USA was the result of individual practices/habits and that changing individual behaviour was the key to preventing litter (KAB, 2009).

The European Directive for plastic bags 2015/704 (Eur-lex, 2015) and the European Directive for Single-Use Plastics (SUP) 2019/904 (Eur-lex, 2019), reiterate all the above-mentioned studies and their scientists' concerns for the emergent need to address the plastic problem, that has no ocean boundaries and spares no coastal areas.

These facts also suggest that marine litter is part of a larger problem of waste management, where consumers' awareness and behaviour bring to a greater extent, the task to manage the environmental sustainability problem that concerns populations and governments around the world.

2.4 Sustainability

> Humanity has the ability to make development sustainable to ensure that it meets the needs of the present without compromising the ability of future generations to meet their own needs. The concept of sustainable development does imply limits - not absolute limits but limitations imposed by the present state of technology and social organisation on environmental resources and by the ability of the biosphere to absorb the effects of human activities. (UN, 1987: 15)

Already in 1987, the World Commission on Environment and Development (WCED) report (see above citation), entitled "Our common future" (commonly known as the Brundtland Report), established guiding principles for sustainable development. It states that critical global environmental problems are primarily the result of the unbalanced way of life between the poverty of the South Nations and the non-sustainable wealthy patterns of consumption and production of the North Nations. The asymmetries were made clear and equity of living standards was a need made evident (op. cit.).

The Bruntland Report called for a new strategy for sustainability and identified sustainable development as [the development] "that meets the needs of the present without compromising the ability of future generations to meet their own needs" (op. cit.). Then and now, sustainable development is a precious concept that needs to be applied in all human activity sectors.

Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. The principles for this way of working in the tourism sector are based on the environmental, economic and socio-cultural dimensions which need to be balanced so that we can guarantee a long-term sustainable tourism industry (UNWTO, n.d.-c).

Oceans and seas cover more than 70% of the Earth's surface and they are greatly responsible for the food we eat, climate regulation, and oxygen production. Their importance is also perceived in worldwide economy, supporting fisheries, international shipping, and the tourism industry. However, due to human activity these vital ecosystems are threatened and face unprecedented changes and massive destruction (UNEP, n.d.-a). It is a fact that we live without the oceans, however, we have increased the use of its natural resources with little concern for its sustainability.

Tourism and its' industry are one of the main threats to the health and preservation of the oceans, with recreational activities, construction development, and pollution aggravation in

coastal areas that damage habitats and reduce the biodiversity of these marine environments. The United Nations Environment Programme (UNEP), claims that we have already lost half of the world's coral reefs, and in 2016 alone we witnessed the death of a 400-mile stretch of the Great Barrier Reef (UNEP, n.d.-b). Programmes like UNEP are addressing these challenges by working with governments, businesses, universities, and civil society groups around the world, promoting the protection and sustainable management of the marine and coastal environments. Science has proven beyond doubt that we are using resources faster than they can naturally recover.

So, to achieve a sustainable future, there is a need to develop new attitudes and change the way we live permanently, which also concerns tourism-related practices.

2.5 Circular Economy

The Circular Economy (CE) definition can be arguably discussed, however according to a study conducted by Kirchherr et al. (2017), not a single study until now has comprehensively and systematically investigated CE definitions. Therefore, for the purpose of this study, the definition of Circular Economy by the Ellen MacArthur Foundation (EMF) was adopted. Since its creation, the Foundation has pioneered the transition of the linear economy development model and its negative impacts on the Planets' ecosystems, into sustainable circular economy principles that respect and protect natural resources.

EMF defines circular economy as "one that is restorative and regenerative by design and aims to keep products, components, and materials at their highest utility and value at all times, distinguishing between technical and biological cycles" (EMF, 2015). This concept seeks to rebuild capital, whether it is financial, manufactured, human, social, or natural; and it looks beyond the current linear industrial model where we take the resources, use them to make products, and discard them after use without truly grasping its life end cycle. It is based on three principles: Design out waste and pollution, keep products and materials in use, and regenerate natural systems (EMF, n.d.) (see Figure 1).

Waste and pollution are seen as a problem, when in fact they are the consequence of bad design decisions. This first principle believes that it is necessary to change mindsets and design products considering their complete life cycle so that waste is not produced in the first place.

The second principle focuses on the reutilisation of materials. Products should be designed to last a long life, however, and even more importantly, we need to be able to keep these materials within the economy, so after their usage they should come back to the productive cycle to be transformed and reused, thus reducing the need for new materials to be extracted from the environment.

To regenerate natural systems is a very important part of CE because it refers directly to environmental improvement. It aims to give back to soils their nutrients and other ecosystems their resources, so that our natural resources can increase instead of reducing.

If products or services are holistically designed, their life cycle will be fully grasped and no pollution or unnecessary use of raw materials will ensue, therefore, for the purpose of this paper, the focus stands on the first principle for CE according to the EMF: "Design out waste and pollution".

Figure 1. Circular Economy Principles

Source: Ellen MacArthur Foundation

2.6 Design and Circular Economy

The Montreal Design Declaration defines design as "the application of intent: the process through which we create the material, spatial, visual and experiential environments in a world made ever more malleable by advances in technology and materials, and increasingly vulnerable to the effects of unleashed global development" (WDS, 2017). This declaration recognizes that we can address pressing global challenges and potentially improve global economic, social, cultural, and environmental goals through design.

We are surrounded by design on a daily basis. Everything we dress, use or construct has been designed to serve a purpose. And purpose is a good thing when products and services are conceived taking into account all their life cycle. However, we are still driven to think the design process in the linear model way, and the consequences and impacts the products or services have on the environment are often not taken into consideration. This is where Design can be the facilitator towards the change to a CE model.

"Designers are professionals, who, by education, outlook and experience, are capable of developing new, interdisciplinary solutions to improve quality of life" (WDS, 2017). Therefore, designers can help stakeholders to look beyond their linear model needs, and consider all the aspects of their services or products in a broader way, where negative impacts are identified before design decisions are made and, ultimately, end-users are even more satisfied. The CE process needs to re-design economic development and transform it into a restorative economy, where people and the environment are equally important. Designers need to be creative and develop new and positive design thinking systems so this can become a reality.

A designer's work can be applied to all types of industries using CE principles, and the tourism industry has a special interest in this approach because the environment is a key element for its success and development. Dynamics like the "New Plastic Economy Global Commitment" (NPEGC, n.d.), are valued especially to the coastal tourism areas, where plastic waste and marine litter are a challenging problem. The NPEGC is an organization lead by EFM that seeks to unite businesses, governments, NGOs, and other organisations behind a universal vision and specific goals to address plastic waste and pollution at its source. The NPEGC envisions a CE for plastic in which it never becomes waste. In the NPEGC three actions are expected to be taken by all signatories (NPEGC, n.d.): i)*"Eliminate all problematic and unnecessary plastic items"*; ii) *Innovate to ensure that the plastics we do need are reusable, recyclable, or compostable";* and iii) *"Circulate all the plastic items we use to keep them in*

the economy and out of the environment". Designers are needed to rethink plastics for the above three actions, as well as to think and create new solutions for the plastics that have already been produced without CE concerns, and that end their life cycle polluting the oceans and seas worldwide.

Another good example of CE applied to tourism is the One Planet Network, an organization lead by UNWTO that aims to guide the tourism sector in the direction of a more sustainable path. One of the network's programmes is *The Global Tourism Plastics Initiative*, which aims "to stop plastic ending up as pollution while also reducing the amount of new plastic that needs to be produced." When much of the plastic used in tourism is made to be disposable and often cannot be recycled, they encourage tourism companies and destinations to get involved and "commit to eliminate the plastic items they don't need; innovate so all plastics they do need are designed to be safely reused, recycled, or composted; and circulate everything they use to keep it in the economy and out of the environment" (One Planet Network, n.d.).

Regarding private tourism-related businesses, the need to become more sustainable whilst maintaining high standard services is starting to be demanded by customers worldwide. The Iberostar Hospitality Group, with more than 110 units around the world, is committed to shift towards a Circular Economy in all of its operations. With hotels spread in 35 countries around the world, the hospitality group employs more than 32,000 tourism professionals and welcomes around 8 million guests each year (Iberostar, n.d.). More than 80% of the Group's hotels are located on seafront sites, thus the group created the *Wave of Change* Programme, which focuses on three main areas: the reduction of plastic pollution; the promotion of sustainable fishing; and the conservation of coral reefs and protection of the Mediterranean Sea. Regarding plastics, the chain started by casting out single-use plastics from their hotel rooms in Spain in 2018, with an expected plastic consumption reduction of more than 175 tons per year only in this country. This measure was implemented in all their hotels worldwide, in 2019. By the end of 2020, the aim is to extend this course of action in all operational areas (within legal restrictions), taking significant steps towards a circular economy in plastics. By doing so, Iberostar intends to prove that luxury, quality, and sustainability can successfully coexist (Wave of Change, n.d.). Through their actions, the company aims to raise awareness on both employees and guests, to the importance of individual actions towards safer and healthier oceans, that ultimately help to tackle climate change.

Figure 2. Wave of Change Programme: Reduction of Plastics through different Design Strategies

Source: Wave of Change 2019 Summary

The examples above, suggest that non-governmental organizations, governments, and tourism companies are truly committed to change the course of their negative environmental

impacts and to shift towards a CE business model, where Design is fundamental in order to provide solutions that respect, protect and raise awareness regarding the natural environment.

3. METHODOLOGY

The methodology chosen for this exploratory study is literature review and case studies analysis (commonly used in social sciences). The analysis was divided in three different steps: description and objectives; stakeholders involved; and key findings. The description and objectives step will comprehend an introduction of the programme or initiative, its main guidelines, objectives, and timeline. The following steps inform the stakeholders involved in the programme or initiative. The key findings consider the adoption of strategies for rethinking, reusing, reducing, recycling and upcycling plastics.

Six case studies were selected using three main criteria: scope diversity; range of action, and maturity level. Regarding "scope diversity", it comprises programmes or initiatives from governmental, non-governmental, and private sector organisations. The "range of action" was defined by the implementation's area of the programmes or initiatives: local, national, and international levels.

As for "maturity levels", the "Portfolio Maturity Model" created by Acuity PPM (Acuity PPM, 2020) was adapted for this study. The maturity levels have 5 different stages (op. cit): initiation, developing, defined, managed, and optimized. Table 1 (see below) summarizes the case studies and criteria adopted for the analysis conducted in the study.

Table 1. Case Studies Framework

Adopted Criteria Programmes or Initiatives	Scope Diversity	Range of Action	Maturity Level
CAPonLITTER	Governmental	National and International	Developing
Observatory for Sustainable Tourism of Algarve	Governmental	Local	Managed
FEE: Foundation for the Environment Education	Worldwide Non-Governmental Organisation	International	Optimized
Associação Portuguesa de Lixo Marinho - APLM	Portuguese Non-Governmental Organisation	National	Managed
Discovery Hotel Management	Private Sector Hotels	National and Local	Initiation
Booking.com	Private Sector Online	International	Optimized

Source: Own Elaboration

3.1 Case Studies

3.1.1 CAPonLITTER

<u>Description and objectives</u>

CAPonLITTER is an initiative that aims to improve policies and practices that can help in preventing marine litter that results from coastal tourism and recreational activities.

More specifically, the project will focus on key fractions of waste, such as plastic food and drink containers originating from beach facilities and recreational events, due to improper behaviour of consumers but also to lack of incentives and structures for prevention, collection, and recycling of waste (CAPonLITTER, n.d.). Its main goal is to develop good coastal practices and improve policies to prevent marine litter. CAPonLITTER involves authorities and organisations from seven European countries in which coastal tourism is a key economic activity highly impacted by marine litter. Portugal is the lead partner and will be exchanging experiences and mutual learning with partners from Spain, Croatia, France, Germany, Greece and Bulgaria. The project will be developed by Nova University of Lisbon with the participation of the Portuguese Government through the Portuguese Environment Agency – *Agência Portuguesa do Ambiente* (APA). It aims to exchange experiences and mutual learning with the support of key stakeholders so that it can explore ways to improve regional policies and the implementation of best practices. Zero Waste Management, marine litter prevention, collection and recycle are also main goals to be achieved. An action plan named "Green Book" will be produced at the end of the initiative and will include recommendations to prevent marine waste resulting from tourism and recreational activities in the coastal zone, compiling the best practices learned by the researchers (APA, n.d.).

<u>Stakeholders</u>

The initiative stakeholders are Governmental Agencies and Public Universities, described as follows:
- Nova University of Lisbon and *Agência Portuguesa do Ambiente* (Portugal)
- German Federal Environment Agency (Germany)
- Region of Crete (Greece)
- IRENA - Istrian Regional Energy Agency Ltd (Croatia)
- Union of Bulgarian Black Sea Local Authorities (Bulgaria)
- MerTerre (France)
- ECOAQUA University Institute - University of Las Palmas de Gran Canaria (Spain)

<u>Key Findings</u>

- The CAPon LITTER initiative will create a Zero Waste Management programme to prevent Marine Litter.
- More sustainable and conscious tourism practices can be implemented when exchanging information with other partners.
- Coastal and Marine Environment can be improved if new and effective policies are created.
- Collection and recycling of Marine Litter at coastal sites will help and preserve the ecosystems.
- UN Sustainable Development Goals to be achieved with the project:
  13 – Climate Action
  14 – Life Below Water
  17 – Partnerships for the Goals.

3.1.2 Observatory for Sustainable Tourism of Algarve

<u>Description and Objectives</u>

The Observatory of Sustainability of the Algarve Region for Tourism (OSART) was launched in March 2019 by the *Região de Turismo do Algarve* (RTA), with the purpose of studying, analysing and monitoring the touristic performance of the region in terms of economic, social and environmental sustainability. The project aims to provide key indicators for tourism stakeholders and policymakers so that a sustainable development can be attained by the Algarve, the main coastal tourism region in the country.

This important assessment tool was developed in close collaboration with the *Instituto Superior de Engenharia* (ISE) of the University of Algarve, and other national and local institutional partners. Over a two-year period (2017-2019) the project was developed and the "Observe" platform (see Figure 2) has been online for almost a year and available for the general public. "Observe" collects, organizes, systematizes and disseminates information on various thematic areas, present in the pillars: Environment, Sociocultural, Economic and Institutional. It does not produce information and its main source of information is taken from its own application (API) and INE. The platform is dynamic and counts with around 77 indicators that can be easily managed, improved, changed, and expanded. It has a participation tab where the general public can make questions, add suggestions, and request new indicators (which the administrators will provide if relevance is considered and data can be obtained).

The OSART has recently integrated the prestigious World Tourism Organisation International Network of Sustainable Tourism Observatories, making Portugal the country with more tourism observatories recognized by the international community in Europe (INSTO, n.d.).

Figure 3. Landing page of "Observe Platform" - Observatory of Sustainability of the Algarve Region for Tourism

Source: OBSERVE, n.d.

<u>Stakeholders</u>

The initiative stakeholders are Local and National Governmental Agencies and a Public University, described as follows:
- University of Algarve – *Instituto Superior de Engenharia*
- RTA - *Região de Turismo do Algarve*
- CCDR – *Comissão de Coordenação e Desenvolvimento da Região do Algarve*
- *Turismo de Portugal*

Key Findings

- The observatory for sustainable tourism of Algarve has a free online platform with key indicators for the development of sustainable initiatives and programmes ("Observe").
- The Observe Platform can be updated according to public and private stakeholders' needs.
- The Algarve tourism region achieved worldwide recognition for environmentally responsive tourism region through INSTO.
- UN Sustainable Development Goals that are/can be achieved with this programme:
  - 11 – Sustainable Cities and Communities
  - 12 – Responsible Consumption and Production
  - 13 – Climate Action
  - 14 – Life Below Water
  - 17 – Partnerships for the Goals.

3.1.3 FEE: Foundation for the Environment Education

Description and Objectives

The Foundation for Environmental Education (FEE) is the world's largest environmental education organisation with members in 77 countries worldwide. Through their five innovative programmes, they aim to empower people to take meaningful and purposeful actions so that they can help create a more sustainable world. Over the past four decades, they strived to make a difference every day by following their eight environmental education principles working towards excellence in Environmental Education and Education for Sustainable Development. For the purpose of this study, we will focus on two of these programmes, The "Blue Flag" and the "Green Key", because they are specifically centred on the tourism sector.

The "Blue Flag" programme was launched in France in 1987 and at the time the FEE was partnered with the European Union. Eleven years after, in 1998, the European Union withdraw their participation and to keep the programme alive, the FEE International Coordinator created a levy that every country had to pay for every site awarded with the blue flag (FEE, 2016). Their mission aims to "promote and participate in environmental education programmes for the users of beaches, marinas and boating operators; implement sound safety and environmental management systems; monitor environmental conditions to reduce the impact of human activity at the beaches, marinas and boating operators; and commit to partnerships and collaborative action to promote the sustainable development of tourism" (Blue Flag, n.d.). For this purpose, they created a world-renowned eco-label that is recognised and trusted by tourists and international governmental agencies like UNEP. This eco-label is yearly awarded to beaches and marinas worldwide, if and when they met the rigorous standards and criteria that the Blue Flag programme supports. Portugal has 378 awarded sites, being that the Algarve region holds 92 of these awarded sites (Bandeira Azul, 2019).

The "Green Key" programme was created by the Danish Outdoor Council originally as an eco-label for hotels and hostels. Inspired by the "Blue Flag" Programme it was brought to the FEE General Assembly in 1998 and rejected at the time. It was only in 2003 that the programme was officially included as a FEE programme (FEE, 2016). It follows the same procedures as the "Blue Flag" programme but is focused on the tourism industry establishments. "Green Key" programme aims to "increase the use of environmentally friendly and sustainable methods of operation and technology in the establishments and

thereby reduce the overall use of resources; raise awareness and create behavioural changes in guests, staff, and suppliers of individual tourism establishments; and increase the use of environmentally friendly and sustainable methods and raise awareness to create behavioural changes in the hospitality and tourism industry overall" (Green Key, n.d.). It is currently present in 66 countries and with 3100 awarded establishments. The "Green Key" label is also yearly awarded and follows rigorous standards and criteria of the "Blue Flag" programme, obviously adapted to the tourism establishments' reality. Portugal has a total of 182 awarded establishments from which 31 are located in the Algarve.

Stakeholders

The initiative stakeholder is the Foundation for Environmental Education.

Key Findings

- FEE is a solid international foundation that has 5 major programmes in which two are focused on what can be done in the present and the other three are seeding the grounds for an aware and environmentally engaged new generation of consumers.
- The "Blue Flag" programme helps to keep coastal areas clean and protected.
- The "Green Key" programme raises awareness on the tourism sector and helps the establishments to change towards a more environmentally and economically sustainable way of working.
- Both "Blue Flag" and "Green Key" programmes achieve the 17 UN Sustainable Development Goals in different countries and in the most diverse contexts.
- Both programmes are also known to the general public, which helps tourists to make better travelling decisions.

3.1.4 Associação Portuguesa de Lixo Marinho – APLM

Description and Objectives

The *Associação Portuguesa de Lixo Marinho* (APLM) first steps go back to 2008 when researchers from "Mare" – Marine and Environmental Sciences Centre conducted studies regarding marine litter. Two projects were created subsequently, "Poizon" (2010-2014) and "Marlisco" (2012-2015). Both projects continued the studies on marine litter, plastics, and microplastics in the marine environment and specifically in the Portuguese coastal area. The interest of creating this association started later through contacts with entities and individuals that shared mutual interests and information. In 2013 the initiative was launched in a meeting that took place in APA's facilities, who had always expressed their willingness to collaborate with the APLM. The association's mission is "to protect the environment against the impacts of litter, especially plastic, in marine and ocean ecosystems and in estuaries waterways and their margins; to raise awareness and promote co-responsibility towards sustainable consumption values, citizenship, solidarity and environmental protection" (APLM, n.d.). Presently the association works with national and international partners, in a total of 22 NGOs and 17 national and international institutional and governmental agencies. APLM has ten projects that have been studied and implemented, all relate to coastal areas and their preservation. The association also engages in educational activities for schools or other organized groups. It has been invited to participate in several conferences and talks where it has the possibility of disseminating information. APLM also has training and capability building activities that can be carried out on a various range of sites, from

teachers at schools to municipalities and private sector businesses. Every single person can get involved by being a volunteer, or an associate, through donation, by participating in the projects, organising a beach clean-up activity, being a partner, or simply by making a suggestion or signing the engagement letter that states the principles of eradication of marine litter on which we all should live by.

<u>Stakeholders</u>

The initiative stakeholder is APLM, although the association develops partnerships with other NGOs and Governmental Agencies both nationally and internationally.

<u>Key Findings</u>

- APLM is a Portuguese association committed with studying, teaching, and acting upon the problem of plastics and marine litter, particularly in coastal areas.
- They created a comprehensive network of NGO's a governmental agency that can help to make a difference towards the preservation and awareness of plastics and marine litter.
- Common citizens are welcome to join the association and participate in many different ways and make the change in their consumer behaviour.
- UN Sustainable Development Goals that can be achieved with the project:
  12 – Responsible Consumption and Production
  13 – Climate Action
  14 – Life Below Water
  17 – Partnerships for the Goals.

3.1.5 Discovery Hotel Management

<u>Description and Objectives</u>

Discovery Portugal Real Estate Fund is a tourism property asset management fund from Portugal that launched its own hotel management brand called Discovery Hotel Management (DHM) in 2015. In an article published that year, the fund management explained that their goal was to maintain the units' authenticity and identity, respecting their roots by integrating traditions with innovation and design. Adding value to the assets would be done through renewing them with an innovative design while working closely with local partners would create differentiating experiences for each hotel and a new approach to hospitality (Discovery Portugal Real Estate Fund, 2015). Since then, DHM has been continuously growing and presently has 17 assets that go from traditional hotels and resorts to design collection hotels, villas and touristic apartments. Currently, more than half of the assets are located in the Algarve, thus our choice of this hotel management brand as our private sector case study.

Concerned about protecting the environment and its natural resources, DHM has recently launched a new initiative called DHM Green. This initiative aims to create an ecological awareness as well as a set of sustainable procedures to be implemented at an internal level. A list of actions is provided, and each hotel is compelled to execute them in order to achieve a total of five levels of internal certification (Root, Trunk, Branch, Leaves, and Fruits). Each hotel nominates its' Green Keeper who is held responsible for the implementation of the actions and is also the person that collects new sustainable ideas or initiatives. The programme is still in an initial phase and adjustments may be made, however, the concept

is engrained and the method of approach may lead towards a greater consciousness towards sustainable tourism.

<u>Stakeholders</u>

The stakeholder of this programme is DHM and its' employees.

<u>Key Findings</u>

- DHM is a hotel management brand that wants to make things differently.
- The DHM Green initiative is an internal sustainability certification programme that raises awareness on all the employees and may act as a catalyst towards creating a more sustainable tourism industry.
- Employees are empowered to make a difference and encouraged to change negative environmental behaviours.
- UN Sustainable Development Goals that can be achieved with the project:
  11 – Sustainable Cities and Communities
  12 – Responsible Consumption and Production
  13 – Climate Action.

3.1.6 Booking.com

<u>Description and Objectives</u>

"Booking.com" is one of the world's leading digital travel companies. Founded in 1996 in Amsterdam by a small Dutch start-up, the business grew exponentially over the past two decades and has presently 198 offices spread through 70 countries worldwide. Its' mission is to "make it easier for everyone to experience the world" (Booking.com, n.d.).

The platform is available in 43 languages and offers more than 28 million accommodation options with competitive prices and worldwide locations. They believe that investing in technology helps potential tourists and businesses or entrepreneurs to seamlessly connect with each other. By doing so, they believe to help tourists achieve the best memorable experiences and businesses or entrepreneurs of all sizes with wide-reaching visibility and potential growth.

The company also has concerns regarding sustainability, as it is aware that tourism is an industry that negatively contributes to climate change. Thus, they created an online sustainability programme called "Booking Cares.com", launched in 2014. This programme focuses on leading tourism and particularly the travel industry into a more sustainable future. It is their belief that everyone benefits from this change, the planet, the tourists, the business partners, the industry itself, and the employees that get to contribute to it (Booking Cares, n.d.). "Booking Cares" defines Sustainable Tourism as being comprised of four main pillars: tourism dispersal; environmental conservation and protection; inclusive travel; and cultural preservation and promotion. It supports two main initiatives, "Booking Volunteers" and "Booking Booster". At "Booking Volunteers", employees are encouraged to volunteer their time and their expertise and partner with local communities and organisations on projects that can help to improve their destinations. "Booking Booster" is an accelerator programme that supports sustainable travel startups by coaching, mentoring, and financing projects that have sustainable concerns.

In 2019 they also co-launched "Travalyst", together with other major online travel companies and the Duke of Sussex. This platform aspires to be a catalyst for good, where

travelling is not only sustainable but also helps and protects both people and places securing a positive future for generations to come (Travalyst, n.d.). "Booking.com" also issues an annual "Travel Sustainability Report" where it shares its findings regarding sustainability for the last four years. Their latest report revealed very interesting data, such as the fact that 72% of travellers believe that people need to act now and make sustainable travel choices to save the planet for future generations (Booking.com, 2019).

Stakeholders

The initiative stakeholders are international online travel companies and an English Monarchy Member, described as follows:
- Booking.com
- Travalyst: HRH the Duke of Sussex, "Booking.com", "Skyscanner", "Tryp.com", "TripAdvisor" and "Visa"

Key Findings

- "*Booking Volunteers*" programme creates awareness and involves the employees with the local community's needs, which may promote more sustainable practices.
- "*Booking Booster*" accelerator programme fosters new ideas that help tourism companies to solve important problems like plastic waste and marine litter.
- "*Booking Sustainability Travel Report*" is a tool that provides data that can be used by the tourism industry as an indicator for developing sustainable activities.
- "*Travalyst*" – A new online platform that aims to use travel as a catalyst for sustainability.
- UN Sustainable Development Goals that can be achieved by "Booking.com" and its partners:
  8 – Decent Work and Economic Growth
  10 – Reduce Inequalities
  11 – Sustainable Cities and Communities
  12 – Responsible Consumption and Production
  13 – Climate Action
  14 – Life Below Water
  17 – Partnerships for the Goals.

4. RESULTS

Climate change is a problem that needs to be addressed worldwide by all of us. The tourism industry has an important role to play in this context, as it is greatly responsible for the problem.

This study focuses on plastic pollution, especially marine litter, and the damages it inflicts on coastal areas, as well as on the actions that are being taken in order to make a positive change towards a more sustainable tourism development.

The first case study, "CAPonLITTER" shows that Portugal is committed to make this change happen and it already started to address the marine litter problem at a governmental level associated to researchers' expertise. According to APA, the programme will study furthermore the negative impacts of plastics in the marine environment, as it is known that they make up to about 90% of all marine litter found in the Portuguese coastal regions. New strategies and policies to tackle marine litter are expected to arise from the information and knowledge that this programme is supposed to collect (APA, n.d.).

The second case study, the OSART, suggests that the main coastal tourism region of the country is also concerned about climate change and has undertaken actions that measure the problem resulting in indicators that may help tourism stakeholders find innovative ways to help mitigation of climate change impacts on its coastal tourism areas. Furthermore, the OSART is now part of a universal sustainability criteria network, the ISTNO, which not only recognises the initiative as valid but also allows comparison of collected data with other worldwide sites.

The FEE, the third case study is the most worldwide recognized programme of all the undertaken case studies. The foundation was created over 40 years ago and its "Blue Flag" eco-certification is known for its high safety standards and continuous work to protect local coastal areas and their ecosystems. The "Green Key eco-label, one of the newer programmes of the foundation also aims to drive the tourism industry into a more sustainable developed sector. Its eco-label is growing year by year and is raising awareness and recognition amongst the tourism stakeholders, both establishments and tourists. Portugal has been closely working with FEE and is one of the countries that presently hold the most "Blue Flag" and "Green Key" awards. This suggests that the government, local authorities, and private sector tourism companies, all made an investment to maintain and improve the conditions of our touristic areas, especially those located near the coast.

The fourth case study, APLM is an association that was born through the Portuguese scientific community. This particular case study shows that academics, government agencies, and regular citizens can all come together in a combined effort to clean our beaches and raise consciousness amongst the Portuguese population to the marine litter growing problem. The association also gathers information and data from its national and international NGO partners, which is essential to make the necessary consumer behaviour changes.

Discovery Hotel Management, the fifth case study, demonstrates the Portuguese tourism private sector engagement towards a more sustainable developed tourism industry, where real and effective actions are beginning to take place. Their innovative design approach to hospitality seeks to maintain the roots and authenticity of the local assets and communities, whilst fostering sustainable and conscious practices. The recently launched DHM Green programme, aims to improve their relationship with the environment and measures to be undertaken include reduction of plastic waste and ending of single-use plastics, amongst other actions that will greatly improve environmental footprint.

The last case study, "Booking.com", represents the travel industry worldwide. As one of the major players when it comes to online travelling companies, "Booking.com" has embodied earth's sustainability needs as a high priority. Climate changes endanger tourism activities all around the globe however tourism is one of the larger contributors to these changes. "Booking.com" created "Bookingcares.com" to act upon the tourism negative impacts on the environment, launching programmes and initiatives that can promote a change, like "Booking Volunteers" and "Booking Booster" startups accelerator. They also study tourists' behaviour and needs, thus contributing to understanding what companies and other tourism facilitators can improve or offer to their guests.

Overall, the case studies analysed have a strong commitment towards the sustainability of the Planet. Whether local or global, all cases show awareness and determination to make the changes that need to be made. Some cases are still in their early stages while others are firmly established, which shows that the problem is not recent, but the emergency is growing fast and expressions like "climate change", "marine litter" or "sustainable tourism" are present in all stakeholders' daily actions. Most of the studied cases already use circular economy principles in their work and when compared to previously referred stakeholders' initiatives like the *New Plastic Economy Global Commitment*, the *Global Tourism Plastics Initiative*

or the *Wave of Change programme*, a continuous growth in the reinforcement of sustainability principles is expectable in order to reach CE's full potential benefits.

In all the analysed cases, Design seems to be a major catalyst for CE, being the first of its' guiding principles, thus it is also expected that stakeholders consider maintaining the development of pioneering projects and processes through this practice.

5. CONCLUSION

As part of the main region of tourist destinations worldwide (the Mediterranean Europe), Portugal is a country where the tourism industry thrives. Year after year, tourism-related indicators are surpassed. The Algarve region is the main receiver of coastal tourism visitors in the country (INE, 2019). But the growth of the tourism sector in both size and importance poses as a dilemma because it brings good economic effects but negative environmental impacts. Thus, the present study aimed to understand how the region is addressing the changes that the sector, as a whole, needs to establish with emphasis on the problem of plastics and marine litter, and if they fit into a framework of measures being implemented by international entities or companies.

Six case studies were chosen, and the majority has a strong presence in the Tourism sector of the Algarve. Findings suggest that the region is aware of the consequences of climate change regarding tourism in coastal areas, its main economic activity, and is therefore acting towards its mitigation. Evidence also shows that the approaches are being directed at the source of the problem, meaning that all stakeholders are preventing plastics and marine litter growth by making circular economy choices. The results also suggest that people are the catalyst element for behaviour change, whether they are represented by governmental agencies, NGO's, tourism private sector companies, or individually, as citizens or tourists.

The current Covid-19 pandemic has changed the tourism sector's forecasted growth pattern without previous warning, and the negative results of it are yet to be determined, however, this event also showed that with less human activity (which naturally is not this study's goal or suggestion) pollution might be at least partially reverted. This may provide a relevant indication for the need to implement new and more sustainable tourism-related behaviours using Circular Economy developments.

Further research needs to be made in order to confirm or review this study's assumptions; however, evidence shows that there is room to develop different and innovative projects, where Design as a circular economy facilitator, can be of major contribution to the Tourism industry, specifically regarding coastal tourism areas.

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INCENTIVES AND RESTRAINS RELATED TO THE DEVELOPMENT OF A WINE TOURISM DESTINATION: A NEW INSTITUTIONAL ECONOMICS APPROACH

Tissiane Schmidt Dolci[1]
Vander Valduga[2]
Artur Fernando Arede Correia Cristovão[3]
Leonardo Xavier da Silva[4]
Marcelino de Souza[5]

ABSTRACT

This paper aims at analysing the way institutions, under the approach of New Institutional Economics, incentivize or restrict the development of a wine tourism destination. This is a case study conducted in Vale dos Vinhedos, Rio Grande do Sul, Brazil, which is the main wine tourism destination in the country. A documental analysis was held along with interviews with 13 representative organizations (public and private) of wine and tourism sectors in the region. In the study, it was observed that wine tourism in Vale dos Vinhedos, lacks formal institutions, being solidly based on informal institutions, in other words, cultural region's patterns. Additionally, the entry of new tourism players, with a different mindset, creates conflicts and institutional pressure, especially related to land usage. It can be observed that leadership structures connected to these sectors have put effort to promote the destination. However, there is little formal institutional incentive. Thus, to solve these bottlenecks, it is recommended that the formulation of incentive policies be coherent with the informal institutional structure of the region, that they support local entrepreneurship, aiming at wine tourism dynamization in small properties, the definition of a shared destiny view and the roles of different segments of governance.

Keywords: Wine Tourism, New Institutional Economics, Institutions, Tourism Development.

JEL Classification: Z30, Z32, O43

1. INTRODUCTION

Research on wine tourism has been growing in recent decades (Getz & Brown, 2006; Alonso, Bressan, O´Shea & Krajsic, 2015; Bonn, Cho & Um, 2018) following the expansion of this activity both in countries that have a long history in wine production, and in countries that are new to wine making. However, there are still few studies that seek to identify the links between institutions and the development of wine tourism (Alonso et al., 2015; Lavandoski, Pinto, Silva & Vargas-Sánchez, 2016), allowing a promising field of research to be explored.

It is observed that there is an emerging effort among researchers to study the institutional environment of tourism (Lavandoski et al., 2016; Fong, Wong & Hong, 2018) under

[1] Instituto Federal de Educação, Ciência e Tecnologia do Rio Grande do Sul (IFRS) e Universidade Federal do Rio Grande do Sul (UFRGS), Brazil (tissisdolci@gmail.com)
[2] Universidade Federal do Paraná (UFP), Brazil (vandervalduga@gmail.com)
[3] Universidade de Trás-os-Montes e Alto Douro (UTAD), Portugal (acristov@utad.pt)
[4] Universidade Federal do Rio Grande do Sul (UFRGS), Brazil (leonardo.xavier@ufrgs.br)
[5] Universidade Federal do Rio Grande do Sul (UFRGS), Brazil (marcelino.souza@uol.com.br)

different theoretical approaches. It appears that institutional approaches can be used to explain various aspects, including: the adoption of different organizational strategies by tourism agents (Lavandoski et al., 2016; Jiang, Zhuo, Zhang & Gao, 2019); adaptive changes that transform tourist destinations (Fong et al, 2018); and institutional factors that impact tourism performance (Roxas & Chadee, 2013; Altin, Memili & Sönmez., 2017).

Although the scientific production on the theme is growing, there are still many possibilities for understanding the evolution of a tourist destination from an institutional perspective. Aiming to contribute with knowledge that helps to fill this gap, this study proposes to analyse the incentives and institutional restrictions to the evolution of wine tourism. This is an empirical study centred on the only Brazilian wine region to have the Denomination of Origin (DO) for wines, Vale dos Vinhedos, located in the state of Rio Grande do Sul.

Despite the fact that wine production is not often associated with Brazil, the country has been expanding its area of wine production. In Rio Grande do Sul, vitiviniculture is associated with Italian immigration in the 19th century and wine tourism has become an important vector of domestic tourism. Vale dos Vinhedos, specifically, received in 2016 more than 400 thousand visitors, presenting an exponential growth in the flow of tourists of about 20% per year for the last 15 years (Valduga & Minasse, 2018).

In this context, this empirical study uses New Institutional Economics (NIE) as a framework to analyse the evolution of wine tourism in a wine region. As in other institutional approaches, in NIE institutions are understood as formal and informal rules that constrain and guide human interactions (North, 1991a). Based on this premise, it focuses on the study of institutions and their interaction with organizations, affecting economic performance (Miguez, 2011). North (1991a) stresses that economic analysis must be studied over time, in a historical perspective and not only in ceteris paribus models.

From this conception, a historical perspective was adopted to address the evolution of: (1) informal institutions, seeking to analyse the cultural aspects of the region, which has its occupation linked to Italian immigration around 1875 (De Paris, 2006; Valduga & Minasse, 2018); (2) tourism-specific formal institutions, at the federal and municipal levels (of the municipalities that make up Vale dos Vinhedos). Considering the institutional matrix as a web, it was sought to focus both informal and formal institutions in the field of tourism, using bibliographic and documentary research to obtain the data. In-depth interviews were also conducted with 13 entities linked to wine tourism in the region, including public and private governance organizations, in order to understand their perceptions about institutional incentives and restrictions on wine tourism.

Vale dos Vinhedos is a product of the Italian immigration context of the late 19th century. Several spatial and institutional arrangements have triggered cycles of wine production, however, the tourist fuse and the qualitative leap in production only occur at the beginning of the 21st century with the recognition of the quality of its wine production, initially with a Geographical Indication (GI) in 2002 and, in 2012, with the recognition of the Appellation of Origin (AO) (Aprovale, 2020). However, although the certifications have provided economic, social and patrimonial advances, from a legal point of view several problems have taken shape. Before the certifications, Vale dos Vinhedos was only a district in the municipality of Bento Gonçalves, in the State of Rio Grande do Sul. After the certification process in 2002, Vale dos Vinhedos started to be composed by two other municipalities: Monte Belo do Sul and Garibaldi. From then on, different municipal laws on land use and occupation began to coexist. Different divisions of rural areas allowed the installation of residential condominiums in the area of the Denomination of Origin, in addition to developments that have no relation with the wine or tourism cluster, generating studies, magazine and newspaper articles (Giordani, 2013; Pioneiro, 2017).

Vale dos Vinhedos has an area of 81.23 km2, with 67 enterprises from several associated areas that cooperate through Aprovale, the association of local producers (Valduga, 2012; Valduga & Minasse, 2018). Therefore, understanding the institutions that guide the behaviour of organizations in relation to tourism is essential for planning and proposing future institutional actions that regulate the development of tourist activities in an orderly and more sustainable way.

2. LITERARATURE REVIEW

2.1 Institutional Studies in the Field of Tourism and Wine Tourism

Although institutional approaches are recurrent in the Social Sciences, there are few studies that adopt these perspectives in the field of tourism (Roxas & Chadde, 2013; Alonso et al., 2015; Lavandoski et al., 2016). However, while examining the recent bibliographic production (2015-2019), in the Scopus database, it was found that the publications that approach tourism from the institutional point of view have been increasing in the last five years, corroborating and complementing the findings of Lavandoski, Albino Silva and Vargas-Sánchez (2013). Institutional approaches are used as a basis for analysis different themes, among which stand out studies on sustainability, institutional quality and institutional arrangements (Table 1).

The analysed papers are empirical and mostly use the institutional theory framework, followed by those based on the NIE. Institutional Theory has its origins linked to the work "Foundations of the Theory of Organization" (Selznick, 1948) and has been evolving with contributions from sociology, political sciences and economics. According to this theoretical aspect, organizations have their behaviour influenced by the institutional environment in which they are involved, thus, under this paradigm, institutional theory focuses on the study of institutions and their interactions with organizations (Scott, 2013).

Table 1. Main Studies with Institutional Approaches on Tourism between 2015 to 2020

Research Area in Tourism Studies	Institutional Framework	Authors
Sustainability (social and environmental)	Institutional Theory	Ambrosie (2015), Grosbois (2015), Vargas-Sánchez and Riquel-Ligero (2015), Luo, Moyle, Bao and Zong (2016), Campos, Hall and Backlund (2018), Font, Bonilla-Priego and Kantenbacher (2019), Melubo Lovelock and Filep (2019)
Institutional Quality	No specific institutional theoretic framework is adopted	Balli, Balli and Louis (2016), Demir and Gozgor (2019), Huang, Li, Jia and Li (2019), Paramati and Roca (2019)
Institutional Arrangements and Governance Structures	Institutional Theory	Knight (2018)
	New Institutional Economics	Qian, Sasaki, Shivakoti and Zhang (2016), Stumpf and Swanger (2017), Badola, Hussain, Dobriyal, Manral, Barthwal, Rastogi and Gill (2018)
Wine Tourism	Institutional Theory	Alonso, Bressan, O´Shea and Krajsic (2015), Lavandoski, Pinto, Silva and Vargas-Sánchez (2016), Lavandoski, Vargas-Sánchez, Pinto and Silva (2018)
Coopetition	Institutional Theory	Fong Wong and Hong (2018)
	New Institutional Economics	Damayanti, Scott and Ruhanen (2017)
Tourism Accommodation	New Institutional Economics	Jiang, Zhuo, Zhang and Gao (2019)
Regional envelopment	New Institutional Economics	Restrepo and Clavé (2019)
Tourism Policy	Institutional Theory	Estol, Camilleri and Font (2018)
Entrepreneurship	New Institutional Economics	Altin, Memili and Sönmez (2017)
Consumer Behaviour	Institutional Theory	Chaney and Martin (2016)

Source: Own Elaboration

NIE, the framework of this study, focuses on the study of institutions and their interaction with organizations, affecting economic performance (Miguez, 2011). Its history is related to the publication of the work "The nature of the firm" (Coase, 1937), which was one of the main inspirations for the elaboration of the theoretical body that later became known as NIE (Ménard & Shirley, 2011; Miguez, 2011). This work was a reference for Oliver Williamson to propose the fundamentals of Transaction Cost Economics (TCE) and Douglass North to develop the approach on institutions and economic performance. Within the scope of the NIE, studies by Elionor Ostrom, which deal with collective action, institutional arrangements and governance of common assets, were also developed. Despite being considered a young theory, NIE studies have significantly impacted the mainstream, so that four works within this scope have been awarded Nobel prizes in the economic area in the last decades (Ménard & Shirley, 2011).

In the field of tourism, in Table 1, it is possible to verify the areas surveyed with the respective approaches adopted. Among the researches that associate institutional approaches to sustainability, it is highlighted the work of Campos et al. (2018) which use the institutional perspective to analyse how multinational tour operators deal with issues of environmental sustainability and social responsibility. Advancing in studies on social responsibility, Melubo et al. (2019) look at how institutional pressures affect the adoption of social responsibility by tourist corporations. There was no evidence of work on sustainability using the NIE approach.

Institutional quality studies are not positioned in relation to a specific theoretical approach, they are concerned with the impact of institutional indicators on the evolution of tourism. The theme of "governance and institutional arrangements" in tourism was addressed in three studies from the perspective of the NIE. Two of them were based on the institutional analysis and development framework (IAD) developed by Ostrom (2011) to analyse the effectiveness of different types of governance in community-based tourism (Qian et al., 2016) and the institutional arrangements in protected areas (Badola et al., 2018). Stumpf and Swanger (2017) relied on Williamson's (2000) analysis of transaction costs to see how transaction costs associated with hotel ventures can be saved.

As can be seen in Table 1, there are works that explore entrepreneurship, consumer behaviour, coopetition, tourism policies, regional evolution and wine tourism. Among these works, the study by Fong et al. (2018) that examined how Macau's tour operators adapted to the broader changes in the institutional environment, moving from a competition logic (characteristic present previously to the release of Casino games) to a logic of coopetition, adopting sharing practices of information and effecting partnerships. Likewise, observing the institutional change, Jiang et al. (2019) analysed the impact of institutions on the evolution of forms of tourist accommodation in China, evidencing a period of conflict between formal and informal institutions, with the subsequent formalization of some institutions, with an evolution in the format of accommodation, which changed from an extensive model into a sustainable format. Restrepo and Clavé (2019) analysed the role of institutions in the development of regional tourism, based on an approach that addresses the weakness of institutions.

Regarding the institutional approach to wine tourism, the work of Lavandoski et al. (2018) and Alonso et al. (2015) stand out. In an empirical study carried out on the Alentejo Wine Route, in Portugal, Lavandoski et al. (2016) showed that institutions, through norms and regulations, influence the development and organizational practices related to tourism in wineries in the region. On the one hand, they observed that institutional pressures restrict certain behaviours of wineries and encourage safer commercial practices, which facilitate transactions. On the other hand, they found that these restrictions also cause rigidity and organizational homogenization, which can hinder innovation processes in wineries.

In another study, Lavandoski et al. (2018) verified the relationship between institutional pressures and dynamic capacity with the development of tourism in wineries, showing that there are three sources of institutional pressures that simultaneously and differently influence the development of tourism in wineries: normative forces; coercive forces and mimetic forces. Both the rules of conduct, regulations and standards for managing the wine route (from Alentejo) and the ability of wineries to learn about tourism and transform knowledge internally influence the development of wine tourism in the organizational context of wineries.

From another perspective, but also using the institutional approach, Alonso et al. (2015) studied the perception of winery entrepreneurs (in Spain, Italy and New World countries) about the impacts of wine tourism legislation, noting that airport controls, laws on drunk driving and the government's coercive role, with the application of fines and other punishments in case of non-compliance with these rules, negatively impacted wine tourism purchases and experiences. In another survey conducted previously in Spain, Alonso and Liu (2012) had already shown that airport security regulations on products that can be carried in hand luggage discourage tourists from buying wines at wineries. These surveys show how intricate the institutional structure of contemporary society is, with institutions that cause externalities in several ways.

Finally, it appears that, on the one hand, the analysis of institutional evolution is increasingly used to explain growth and results of different policy applications between regions (Restrepo & Clavé, 2019). On the other hand, institutional evolution (which includes legislative and political interventions) has not been thoroughly examined in wine tourism (Alonso et al., 2015), therefore knowing the institutional evolution linked to tourism can be an important point to understand the development of wine tourism regions.

2.2 New Institutional Economics Fundamental Concepts

In order to clarify the theoretical perspective adopted in this research, the fundamental concepts of the NIE, in its macro-institutional aspect, will be exposed. A first point to be clarified is that institutions are understood as "the rules of the game in a society or, more formally, are the humanly devised constraints that shape human interaction (North, 1991a: 3). In this perspective, institutions appear and are being improved over the evolution of societies, as a way for humans to deal with the uncertainty of social, economic and political interactions. That is, based on the assumption that the environment in which agents operate is uncertain, societies develop institutions, with the intention of minimizing these uncertainties, guiding the agents' economic, social and political interactions (North, 1991b). Such concept of institutions, proposed by North (1991a), is widely accepted and recurrent in the literature. In addition to this understanding, there is a general understanding that institutions are fundamental to explain the economic performance of groups and societies (Kalmanovitz, 2003). Essentially, institutions include the following aspects: (1) formal restrictions, which may be laws, rules, property rights, contracts; (2) informal restrictions, covering traditions, beliefs, behavioural and cultural patterns; and, (3) enforcement, that is, mechanisms to enforce contracts and laws (North, 1991a).

Formal, informal and enforcement institutions, together, configure the institutional matrix of a society, which is understood as: "an interconnected web that in various combinations shapes choice sets in various contexts" (North, 1991a: 67). It is the institutional matrix that, together with the standard restrictions of economic theory, determine opportunities, defining the incentives for the emergence of organizations. Since institutions are the rules of the game, organizations (economic, political, social), similarly, are the players, as North (1991a: 4-5) explains: "The purpose of the rules is to define the way the game is played. But

the objective of the team within that set of rules is to win the game - by a combination of skills, strategy, and coordination; by fair means and sometimes by foul means".

Organizations are seen as agents of change, which arise within a certain institutional context and insofar as they realize that they could have better results, restructuring exchanges, they mobilize resources to change the institutional structure and reassure rights (North, 1991a). In this sense, the institutional environment influences the structuring of organizations and, simultaneously, organizations influence the institutional matrix. The process of institutional change is complex and incremental, and may be the result of changes in rules or informal and formal restrictions, or even ineffectiveness in enforcing the rules (North, 1991a, 2005). Formal institutions can change more abruptly and informal ones tend to be more impermeable and are often the key to understanding path dependence, that is, "the way by which institutions and beliefs derived in the past influence present choices" from individuals and organizations (North, 2005: 21).

Thus, path dependence is another fundamental concept for understanding institutional dynamics, demonstrating that inefficient solutions can persist over time. For North (1994), learning creates path dependence on ideas, ideologies and institutions. A concept learned by an individual, which is useful to explain the world, is more likely to persist in your mental model, even if it is not efficient, implying path dependence. Therefore, path dependence is not equivalent to inertia, but to the restrictions on the choice of the present resulting from past experiences (North, 2005). As such, path dependence plays a crucial role in institutional flexibility.

Another important aspect, exposed by North (1991a), is that institutions are not created to be socially efficient, at least formal ones, but instead created to serve the interests of those with better bargaining conditions to structure new laws. So, the institutional matrix that influences transactions is composed of rules that promote the maximization of opportunities and others that promote barriers to entry, encouraging monopolistic restrictions and preventing the flow of information at a lower cost, influencing both transaction costs and of production. Thus, the institutional matrix imposes severe restrictions on the set of choices of entrepreneurs when they seek to innovate or modify institutions in order to improve their economic or political positions (North, 2005), incurring high costs for their change.

Furthermore, given the variety of institutions and possible interactions that make up the institutional matrix, its structure is stable, that is, it is not a single institutional change that will cause the matrix to change. Institutional change takes effect based on incremental change in the long run: changing a standard, combining modifying a convention and so on (North, 1991a). Hence, the importance of the historical perspective and of an expanded institutional analysis to understand institutional dynamics and economic performance.

3. METHODOLOGY

The methodological design of the research was based on the theoretical perspective of the New Institutional Economics, more specifically the study of the institutions of Douglass North (1991), which directs to carry out a historical analysis that enables the understanding of institutional change over a period. Williamson (2000) outlines the levels of analysis of the NIE in four segments according to the theoretical approach adopted (Figure 1), indicating the times when institutional change occurs. The first level comprises the customs, tradition, culture, religion of a people. At this level, institutional changes take time to occur, ranging from 100 to 1000 years. At the second level, there are formal rules through constitutions, laws and rules, in which changes occur more quickly, ranging from 10 to 100 years. The third level covers the governance of transactions, in which contracts and their safeguards are

analysed. At this level, change can take between 1 and 10 years to happen. The fourth level deals with the different ways of allocating resources and the most efficient way to allocate them, so that change happens continuously (Williamson, 2000).

Figure 1. Analytical Level of New Economics Institutions
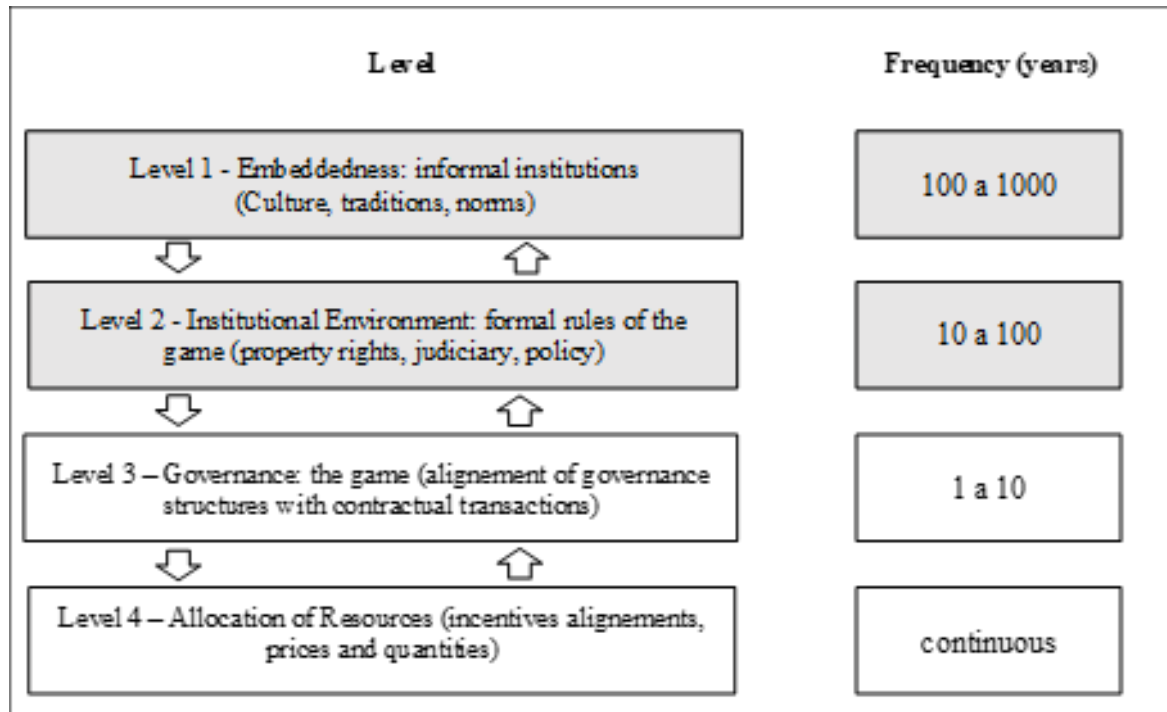
Source: Adapted from Williamson (2000: 597)

By focusing on the legislation relevant to tourism at the federal and municipal levels, as well as on the cultural standards of the studied region, the institutional analysis proposed in the present work is located at levels 1 and 2 of the Williamson (2000) model. Thus, different data collection strategies were adopted to obtain information related to each level. Data on informal institutions (Level 1) were obtained through bibliographic research and semi-structured interviews on historical and cultural aspects of the region. For the research of formal institutions at the federal level, the legislative research tool available on the website of the Parliament was used, comprising the historical outline from 1934 to 2019. Concerning the research on formal institutions in the municipalities of Bento Gonçalves, Garibaldi and Monte Belo do South, the Municipal Laws[6] portal was searched.

For the legislative search, the keyword "tourism" was used as a parameter in the ordinary laws and municipal decrees and as a parameter for the date of publication until 2019. Complementary data were obtained in documents provided by the Municipal Tourism Departments of the municipalities surveyed. The selected documents were tabulated and categorized into themes. The analysis of the most relevant legislation was done individually, based on the interpretation of its texts.

In addition to documentary research, semi-structured interviews were conducted with representatives of organizations (public and private) that are directly or indirectly involved in the development of wine tourism in Vale dos Vinhedos. The organizations were mapped and selected through bibliographic research and field observation. In total, 13 organizations were interviewed: Aprovale (Association of Fine Wine Producers of Vale dos Vinhedos); Atuaserra (Serra Nordeste Tourism Association); Ibravin (Brazilian Wine Institute);

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[6] Through this website (LeisMunicipais.com.br), City Halls and Chambers from Brazil make available the laws of their municipality.

Segh (Business Union of Gastronomy and Hospitality - Grape and Wine Region); Bento Gonçalves Tourism Secretariat; Garibaldi Department of Tourism; Secretariat of Culture and Tourism of Monte Belo do Sul; Bento Gonçalves Municipal Tourism Council (Comtur - BG); Municipal Council of Tourism of Garibaldi (Comtur - Garibaldi); Municipal Council for Historical, Artistic, Cultural, Development and Sustainable Tourism of Monte Belo do Sul - Comphacdtur; Aenotur (International Wine Tourism Association); Embrapa Uva e Vinho (Brazilian Agricultural Research Company); Sebrae (Brazilian Service of Support to Micro and Small Enterprises). The interviews sought to identify the perception of these organizations about institutional incentives and restrictions and the existence of shared norms and values about wine tourism.

The interviews were conducted from May to August 2019 and the documental reserch from March 2019 to January 2020. Each interview was audio-recorded and then transcribed. These interviews and law/policy documents were imported into the qualitative data analysis software NVivo12. All data were open coded to identify patterns and categorize key themes. By analysing the collected data and theoretical concepts, the categories and nodes that emerged after condensing the initial codes can be seen in Table 1. Working across these data and comparing the results with literature review, the authors recognized the institutions that affected the development of wine tourism in the target region.

Table 2. Categories and Codes of Institutions

Categories	Codes
Informal Institutions	Italian immigration culture; cooperative behaviour; competitive behaviour; entrepreneurship; family and hard work; mimetic learning; collective action
Formal Institutions	Tourism federal laws; tourism municipal laws; tourism policy; land use laws; tax laws; drink driving laws; luggage law; labour laws; civil associations; public investments; rural infrastructure.

Source: Own Elaboration

4. RESULTS

The following are the research results divided into two axes, the first one dealing with the informal institutional environment, that is, the cultural context in which wine tourism has emerged and has evolved, and the second with formal tourism institutions at the level of the municipalities that make up the Vale dos Vinhedos, entering the federal institutional context in which they are immersed, analysing how this network of institutions encourages and restricts tourism, as well as the problems that need formal regulation to be confronted.

4.1 Informal Institutions - Wine Culture and Tradition in Vale dos Vinhedos

Vale dos Vinhedos is immersed in an ethno-cultural context predominantly of Italian descent and which involves more than 30 municipalities colonized after the immigration that took place at the end of the 19th century. The immigration process took place in the midst of the Italian crisis, hunger and misery, in addition to the process of replacing slave labour, during the Brazilian imperial government, and the need to produce food for the emerging urban centres (Luchese & Caprara, 2001).

The process of settling immigrants took into account cultural and territorial elements of their origins, with a focus on religiosity, agricultural actions in which there was a mastery of techniques (such as winemaking) and Brazilian state and institutional support in these settlements, endowing these spaces technical means to promote agricultural activities.

The viticulture had previous expressions in the country, however, the productive specialization and commercial expansion started from the Italian immigration from 1875 and that ended up making Vale dos Vinhedos and its productive surroundings references in the wine production and wine tourism in the country (Valduga, 2014). A wide range of institutions has allowed advances in the process of anchoring viticulture, from a wide cooperative wine movement that has lasted since the early 20th century to research institutions such as Embrapa Uva Vinho and regional management and tourism governance such as Atuaserra, which involves 26 municipalities and that was the first instance of regional governance in tourism in Brazil, operating since 1985 (Salvagni, Valduga & Nodari, 2016).

Among the cultural aspects indicated in the interviews and converging with the literature (Farias, 2016) that were important for the development of viticulture and wine tourism, the following stand out: the valorisation of work, entrepreneurship and learning by imitation. The Italian immigrant is perceived as a good worker and entrepreneur, according to the following statements:

> So, there are ways of acting that we have that are very interesting, as I said here, everyone is thirsty to undertake. (Interviewee 1, 2019)

> Another cultural matter, the moment we get here, the vein of entrepreneurship. We have in our blood the thing of undertaking, not settling down, seeking solutions, self-renewing. So much so that we have a CNPJ7 in Bento for every 10 inhabitants. We have 120 thousand inhabitants and more than 12 thousand CNPJs. (Interviewee 7, 2019)

> I believe that this is a very strong cultural factor, the difficulty they had and what they undertook, success as an entrepreneur. (Interviewee 13, 2019)

In the view of Denzau and North (1994), individuals with common environmental and cultural experiences will share similar ideologies, institutions and mental models. Those who have different experiences and learning processes will interpret problems from other points of view, generating different choices. That said, there is evidence that the mental models shared by Vale dos Vinhedos organizations prioritize work and entrepreneurship, crucial aspects for the emergence of small wineries with subsequent wine tourism offer.

This appreciation of work is often linked to the devaluation of formal State institutions, which demonstrates the lack of confidence in the country's laws and policies: "[...] they work with a very strong and obstinate focus to achieve this result, so independent of the state, independent of state policy, government policy, politics […]" (Interviewee 2, 2019).

Another interesting cultural aspect, which says a lot about the "way of doing" in the region, is the path dependence on learning and innovation by imitation. In the interviewees' statements, expressions such as "the Neighbour's grass is always greener" and "good envy" are recurrent to designate the process of seeing what the competitor is doing, its innovations and offers.

> there is another side that may be a little tougher, how can I reinvent myself without simply copying the neighbour? In recent times it is a little better, but before it was: "the neighbour is selling pancakes, great, it's packed, so I'm going to sell pancakes too", so I think this has a little more maturity and is what you have to take care of. I think it's something that you have to take care of. And it is a little more difficult culturally, "but I always did it like this, grandma did it like

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[7] In Brazil "CNPJ" is the register that all legal entities are required to register before starting their activities.

that, my mother did it like this", so this is something we have to ... And there will always be someone who does it first, isn't it? Obvious, but you don't have to look and copy, do you? (Interviewee 4, 2019)

In addition to these aspects, there is a paradoxical relationship between collective work and individualism, which indicates some form of coopetition that is part of the regional culture. On the one hand, according to Santos (1978), there are many reports of cooperation by immigrants to build churches, schools and open roads. Community solidarity extended to agriculture and, over time, collective action had notorious merit in the development of the region (Salvagni et al., 2016). On the other hand, the strong competition between the companies of Vale dos Vinhedos, mainly with regard to the production of quality wines, is perceived as a factor of development by all interviewees, at the same time that there is consensus on the existence of a union of forces, when this is necessary.

Institutionalised collective action, linked to the development of wine tourism in Vale dos Vinhedos, has its origins related to changes in formal institutions of the 1990s, the most notable being: demand for compliance with the Paris Convention and openness to Mercosur imports (Falcade, 2011). Such changes generated a crisis in the wine sector that resulted in the decline of large companies and the appearance of small wineries that created Aprovale, with the intention of joining efforts in search of qualification of wine production and promotion of tourism (Aprovale, 2020), in a coopetitive logic. According to Fong et al. (2018) critical events in the institutional environment have a cumulative effect on the logic of coopetition, that is, the change in formal rules impacts organizations, which need to change their behaviour patterns (informal institutions) to adapt to the new rules of the game, then there is a cumulative institutional change (North, 1991a).

That said, in the process of concluding the analysis of informal institutions, it appears that the cultural patterns and beliefs of organizations in that territory played an encouraging role in the development of wine tourism in Vale dos Vinhedos. The entrepreneurial characteristics and obstinacy for work made it possible to boost tourist activity in the face of a crisis in the wine sector. On the other hand, the expansion of the tourism supply, with the increase in the number of wineries that offer visits and tastings, and the exponential increase in restaurants, reflect a path dependence on an innovative process in which small wineries "copy" the process of the largest (Farias, 2016). Such finding is in convergence with the literature (Benson-Rea et al., 2011; Lavandoski et al., 2018) which indicate that mimetic forces influence the development of wine tourism by wineries.

4.2 Formal Institutions and Wine Tourism

Wine tourism, in Vale dos Vinhedos, develops in a geographical space located in areas of three municipalities: Bento Gonçalves, Garibaldi and Monte Belo do Sul. In this way, the legislative framework of these municipalities impacts on the development of wine tourism. Valduga and Minasse (2018) classify the stages of evolution of wine tourism in Brazil into four phases: (1) the first phase, spontaneous, started in the 1920s with the installation of the railway and the search for a mild climate for summer. (2) The 2nd phase (1930-1970) was marked by tourism and bureaucratization, with the creation of major events related to wine making and the dissemination of wine as a cultural and tourist identity product in the region. (3) In the 3rd phase (1970-2000) the organization of tourist activities and the transition from the cooperative model to a model of small family wineries took place. (4) The 4th stage, which started in the 2000s, refers to wine tourism linked to the qualification of wine production and solidification of Geographical Indications, with diversification of the offer with the promotion of wine tourism experiences.

Taking these phases as a reference, a scheme was elaborated summarizing the main formal institutions of each phase (Table 2). It was found that in the 1st phase, not only in the municipalities but also in Brazil, the theme of tourism was not addressed at a formal institutional level, since the first references to tourism in Brazilian legislation date from the 1930s, with specific actions, among which stands out the creation of the Tourism Division (Carvalho, 2016). It was only in the 2nd phase that the municipalities of Bento Gonçalves and Garibaldi had their first legislation on tourism. In 1957, Garibaldi was a precursor in the state of Rio Grande do Sul to create a Municipal Tourism Council, whose duties included carrying out a tourist inventory, organizing a tourist calendar and proposing festivities aimed at attracting tourists (Fávero, 2006). In Bento Gonçalves a "tourism tax" was instituted to promote summer tourism, in 1959. In 1965, the Municipal Tourism Council of the municipality was created, with the same duties as the Garibaldi council, with a mimetic pattern among the municipalities being evident. In addition to the creation of the Councils, at that time there was the establishment of specific laws on tax exemption for hotel buildings and changes in the composition of the Municipal Councils.

The creation of tourism councils in the municipalities occurred at the same juncture as the bureaucratization of tourism at the federal level, with rules that defined the national tourism policy (PNT), created the National Tourism Council (CNTur) and Embratur (Brazilian Tourism Company). This decree provided the CNtur's task to develop, coordinate and direct the national tourism policy. Embratur was responsible for promoting the development of tourism and implementing the guidelines set by the government (Decree-Law 55/1966). In that decree, there were provisions on tax incentives and financing for tourism projects, converging with the municipal tax incentive laws created in the period. Thus, it is possible to affirm that the first regulatory framework that in fact attempted to propose some type of regulation for the development of tourism in the country dates from the late 1960s and early 1970s.

In the 3rd phase (1970-2000), the federal institutional context had important advances. In 1971, the General Tourism Fund (Fungetur) was created, with the purpose of promoting and providing resources for the financing of tourism projects. This measure was of great importance for the implementation of tourism infrastructure in the country, especially with regard to the accommodation structure (Araújo & Taschner, 2012) and the municipality of Bento Gonçalves, in 1981, benefited from Fungetur's investment for the construction of a structure linked to Fenavinho[8]. In Brazil, during the 1970s, rules were also established that provided for the definition of areas of tourist interest and the inventory of goods of cultural and natural value for tourism purposes, and that established conditions for an activity to be considered tourism, creating the obligation to register with Embratur.

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[8] Bento Gonçalves wine festival.

Table 3. Formal institutions in the different phases of wine tourism evolution in Vale dos Vinhedos

Wine Tourism Phases	Formal Institutions			
	Brazil	Bento Gonçalves	Garibaldi	Monte Belo do Sul
1ª Phase (1920-1930) - Spontaneous Tourism	—	—	—	—
2ª Phase (1930-1970) Touristification and Bureaucratization	Tourism Division Embratur and CNTur National Tourism Policy	Tourism tax Comtur Tax Exemptions	Comtur Commissioned position of secretary Tax Exemptions	—
3ª Phase (1970-2000) Transition	Fungetur Areas of tourist interest and conditions for tourist services 1st PNT PNMT National tourism policy	Operation with Fungetur Atuaserra affiliation Creation of the Vale dos Vinhedos District Events calendar New Comtur Tourism secretary	Tax Exemptions Tourism secretary Atuaserra affiliation Tourist activities as a priority interest Events calendar	Creation of the municipality Atuaserra affiliation
4ª Phase (2000 – present time) Wine tourism anchored in the recognition of production qualification	Creation of Mtur PNT (2003-2007 / 2007-2010 / 2010-2016 / 2018-2022) General Tourism Law Tourism Regionalization Program	Aprovale -Comtur member Technical position in tourism Master Plans Municipal Tourism Plans	Technical position in tourism Master plan Municipal Tourism Plans Comtur Rules Approve as a member of Comtur	Secretariat of Culture and Tourism Master plan Municipal Tourism Plan Comphacdtur

Source: Own elaboration, based on Valduga and Minasse (2018) stages of evolution of wine tourism in Brazil

In legislative terms, the 1980s were marked by the promulgation of the Federal Constitution in 1988, a moment of great importance in the country's institutional history. With this, tourism was legitimized as a factor of economic and social development, being the object of promotion and incentive by all levels of government (Union, States and Municipalities). According to Maranhão (2017), this guideline to encourage tourism, as a promoter of economic and social development, is linked to the panorama of the "lost decade", typical of the 1980s, when Brazil faced a period of economic fragility and sought new alternatives for income generation and the country's economic growth.

The 1990s are considered a watershed (Carvalho, 2016; Maranhão, 2017) in the management and organization of tourism, with the creation of a set of rules that provide guidelines and seek to organize the sector. First, Embratur was restructured and CNtur ended, and in 1992, the first National Tourism Plan - Plantur (1992-1994) was launched. Another institutional advance of that time was the regulation of the tourist guide profession. In 1994, the publication of the National Program for the Municipalization of Tourism (PNMT) stands out, aiming at the decentralization of the activity. Then, in 1996, the National Tourism Policy 1996/1999 was published and with it a set of guidelines and programs.

Within municipalities, this period was also marked by small advances in the institutional structure of tourism. Perhaps the most important, from the perspective of tourism, is the creation of Atuaserra, in 1985, with 11 municipalities as partners, including Garibaldi and Bento Gonçalves. The entity aimed, among other objectives: to act in the tourism promotion of the municipalities; to promote the improvement of working methods; to encourage exchanges with other bodies. Currently, Atuaserra involves 26 municipalities and is a reference in the country, since it was the first instance of regional tourism governance in tourism in Brazil (Salvagni et al., 2016). It is also worth mentioning the creation of specific bodies to deal with tourism in the municipalities of Bento Gonçalves and Garibaldi, with the creation and structuring of the municipal tourism secretariats, during this period.

Two other institutional events, not specific to tourism, but which directly affected the shaping of Vale dos Vinhedos, were: the emancipation of Monte Belo do Sul from the municipality of Bento Gonçalves, becoming a municipality in 1992; and the creation of the Vale dos Vinhedos district, in Bento Gonçalves, in 1990.

Table 1 shows the phases of wine tourism in Vale dos Vinhedos and the respective formal institutions of the municipalities. In the local and private sphere, it was in the 1990s that Aprovale was created. And, it is from there that this organization will, with the support of Embrapa Uva e Vinho, seek recognition for the quality of wine production, in a process that culminates with the Geographical Indication in 2002 and, in 2012, with the recognition of the Appellation of Origin (Aprovale, 2020), giving the contours for the 4th and current phase of wine tourism in Vale dos Vinhedos.

The 4th phase of wine tourism, in terms of planning this activity in the country, is marked by the creation of the Ministry of Tourism (Mtur) in 2003. Despite this, the management of the agency has shown weaknesses, with the exchange of ministers and little representation politics (Maranhão, 2017). With the creation of Mtur, the National Tourism Plan (PNT, 2003-2007), which guided the way in which tourism would be treated by the State in the coming decades, since the PNTs that followed it maintained the logic of decentralization, with proposals of tourism regionalization. Among the programs proposed in the PNT (2003-2007), the following stand out: Regional Development Program; Integrated Routes Program; Standardization Program for Tourism Activity; Professional Qualification Program (Mtur, 2003). The implementation of these programs was important in continuing the strategy of decentralizing the tourism operationalization, proposing arrangements at the regional level and defining regions through the creation of the Brazilian Tourist Map. Within this scope, the Encosta da Serra do Nordeste region, which was already organized through Atuaserra, consolidated its position as "Grape and Wine Region". This positioning clearly brought benefits to Vale dos Vinhedos, with synergies between the two brands that are based on the cultural wine product.

At the end of the 2000s, more precisely in 2008, the General Tourism Law was approved. This law added relative norms that were dispersed in the legislation, outlining parameters for the planning, incentive and development of the tourism sector. Among the advances in this legislation, there is the institution of the National Tourism System, the regulation on registration (Cadastur), classification and inspection of tourism service providers. In these institutions, a more rigid and restrictive posture in relation to the tourist services provided was evidenced, in order to guide the planning and qualification of the offer (Carvalho, 2016). PNT (2007-2010), in the scope of regionalization, innovated in focusing on tourism-inducing destinations. A study was carried out, mapping destinations capable of boosting the territory's economy and distributing tourists to its surroundings. Bento Gonçalves was one of the three municipalities selected in the state of Rio Grande do Sul, among the 65 inductive destinations in Brazil. According to the interviewees involved with tourism management in the municipality, "Destinos Indutores" was an important planning and development tool, with the provision of training, consultancy and monitoring by the federal government. According to interviewee 2, participation in "Destinos Indutores" brought institutional pressure to formulate a municipal tourism plan to guide and plan the actions developed by the municipality.

The first Bento Gonçalves Municipal Tourism Plan was developed in an integrated manner, with the participation of the tourist trade using Mtur methodology. Vale dos Vinhedos was positioned as an attractive anchor for Bento Gonçalves and actions were proposed to improve the destination. The plan was updated for the 2015-2018 period and, in 2019, it was in the process of being reworked. In Garibaldi, the first Tourism Plan dates back to 2013. In 2014 it was re-elaborated with effect until 2018, being in the process of

being updated in 2019. Monte Belo do Sul already had two tourism planning documents, the first elaborated in 2009 that predominantly was not put into practice and the second in 2017, which has been effective since then.

It should be noted that despite Vale dos Vinhedos being an attractive anchor of the three municipalities, Aprovale, which is its main representative body, only participated in the construction of the Bento Gonçalves municipality plans, with no evidence of its participation in the plans of the other municipalities. Likewise, there is a greater connection between Aprovale and Bento Gonçalves tourism, since the entity has been part of the municipality's Comtur since 2001. In Garibaldi, it was only in 2018 that Aprovale became part of Comtur and until this research was carried out, an associative entity was not part of the Monte Belo do Sul council. Considering that in the institutional dynamics, organizations make the move to change or not to change the institutions (North, 1991a), it is problematic that Aprovale does not participate in this standardization process.

It was verified that the elaboration of tourism plans by the municipalities and organization of councils has been encouraged by Atuaserra, within the context of the strategy of regionalization of adopted by Mtur some years ago. Among the federal investment programs in tourism that the region was contemplated with, it is highlighted the choice of the city of Bento Gonçalves as a cultural destination during the World Cup and currently the participation of Bento Gonçalves and Garibaldi, along with other cities in the Serra Gaúcha, at Investe Turismo, a program launched in 2019 to encourage consolidated itineraries. In addition, in the 2000s, positions of tourism technicians were created in the municipalities of Bento Gonçalves and Garibaldi, seeking to professionalize the activities of the tourism departments.

In broader institutional terms that directly affected wine tourism, the City Statute (Law 10.257/2001) delegated to the Municipal Master Plans the role of regulating the ordering of land use in municipalities. Thus, the three municipalities have specific legislation to regulate land use in urban and rural areas. Despite these regulations that seek, at first, to restrict the disordered urban development, the problems related to the occupation and transformation of land use in the Vale dos Vinhedos space have increased over the years (Giordani, 2013). Bento Gonçalves had its first master plan institutionalized in 2006, and the second in 2018. Both contemplated issues related to the tourist vocation of Vale dos Vinhedos, however, the elaboration of these plans is surrounded by a lot of pressure from real estate investment organizations, with a game of forces that does not always result in efficient formal institutions, since the norms are created to serve the interests of those with greater bargaining power (North, 1991a).

In addition, there is the impact of the master plans of Garibaldi and Monte Belo do Sul in the Vale Vinhedos area, with different views and provisions on land use. As, for example, Garibaldi's master plan, which allows the implementation of horizontal condominiums in the Vale dos Vinhedos, despite considering the area an area of tourist interest and transition between the urban and the rural areas. According to the interviewees, there is no articulation between the three municipalities in thinking and developing integrated norms and with a common vision for this territory, which, in the medium and long term, is causing the reduction of the area dedicated to vineyards, impacting the wine landscape that is one of the main attractions of the region.

> There is a great lack of characterization of the landscape, what the tourist expects to see and what he finds. I've been with journalists who arrived in front of Vila Michelon who asked when Vale dos Vinhedos started, because until then you don't see anything, you only see signs, buildings. [...] if there is no plan

for the Valley, disorder is created because it is a little bit of each municipality. (Interviewee 8, 2019)

Thus, it is evident that the restrictions on land use and standardization of tourist activity have not been sufficient to contain the disorderly land occupation, and may cause serious problems in maintaining tourist attractiveness in the long run.

5. CONCLUSION

This study examined the institutional incentives and restrictions to the evolution of wine tourism in Vale dos Vinhedos. The findings reveal that tourism in Vale dos Vinhedos is an activity derived from a development process of a wine region that has its foundations in cultural and legal aspects linked to Italian immigration that occurred in the late 19th century. Family and hard work; entrepreneurship, collective action and coopetitive logic are informal institutions that encouraged the development of tourism in this territory and made possible its consolidation as the main wine tourism destination in Brazil.

With regard to formal institutions specific to tourism, the Brazilian trajectory is recent, with less than 100 years of history. The normalization of tourism in the municipalities that make up Vale dos Vinhedos is even newest, dating from the end of the 1950s. Despite the existence of formal institutions prior to the 1990s, they were punctual and focused on establishing administrative structures and defining basic precepts tourism, not providing a guiding framework capable of guiding the development of this activity in the country.

From the 1990s onwards, a new institutional framework focused on decentralization and regionalization began to take shape and gradually evolved. However, this institutional body that normalizes tourism is still incipient. The lack of more specific regulations often results in the restriction of tourism development, since the absence of institutions that guide economic interactions affects transaction costs. In addition, the lack of regulations encourages a disorderly development that in the long run can make tourism activity unfeasible.

In the last 20 years, there has been important institutional changes with new rules about land use and tourism planning. Since then, local and regional tourism governance associations, as well as public agencies, have been promoting tourism. However, due to the limited coordination and integration between the municipalities that are part of the Vale dos Vinhedos, there are discontinuities between the master plans and tourist plans that order this territory. In addition, the growing use of rural space for tourism purposes, with the entry of new players, may scale conflicts about mass tourism and inappropriate use of resources.

Although formal institutions had been created and adopted at municipal levels, it is questionable whether these actions and policies can encourage responsible tourism growth. These institutions are not stable enough and often reflect the interests of organizations with greater bargaining power. In the absence of strong formal institutions, informal institutions end up prevailing in the way of coordinating and developing wine tourism in the region, strongly based on the mimetic process.

Obviously, future analyses may be necessary to check the restrictions and incentives of institutions that are not specific to tourism, but can directly impact its development, including: labour, tax and security laws, such as drink-driving law. Finally, it is highlighted that this research contributes to the discussion on the role of institutions in the development of tourism activity, an approach that has been growing in the recent literature on tourism.

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READING THE TOURIST DESTINATION: BIBLIOTOURISM AND PLACE PERCEPTION

Maria Isabel Roque[1]
Dália Guerreiro[2]

ABSTRACT

Bibliotourism is a recent concept and an emergent segment of cultural tourism. Considering both the phenomena of tourism increase and the passage from the information society on to the knowledge society, the role of public and heritage library faces new challenges and priorities. The building's architecture, the artistic bookshelves display, and the value of the collection may be offered as cultural values, determining the library as a tourist attraction. Furthermore, libraries may also assist in all the travel phases, from the preparation to the place experience and its memory preservation. Considering that the cultural tourism motivations are related to learning, experiencing and understanding the place's history, culture and heritage in both intangible and tangible components, libraries, as documental repositories, are crucial to support the tourist's information needs and demands. While traditional libraries are reinventing cultural mediation strategies to spread knowledge about those issues, namely by organising exhibitions and performative events, digital libraries, over the past two decades, have become crucial channels in obtaining information. By providing access to data through a range of resources and services in a very inclusive and ubiquitous manner, digital libraries are an essential tool to the tourism planners and consumers, and play a strategic role for the newest tourist generations, and mainly for the Generation Z tourists. Bibliotourism and tourism activities focused on libraries create mutual benefits and development opportunities, as the available knowledge enhances the sense of place and more immersive experiences. The research in this field is at a very early stage, and the theoretical framework is underdeveloped, even if some case studies have been presented in the last years. The main objectives of this paper, conceived as a descriptive study, are to provide critical analysis of the bibliotourism concept and to provide an overview of how to approach the public libraries functions from a touristic perspective. The methods used to achieve these objectives are based on bibliographic research, by confronting the term citations in the general and specialised press with its references in scientific journals, followed by the direct observation of the use of libraries by tourists, in the framework of a theoretical and empirical research model. The expected results are the creation of a new perspective about integrating libraries, cultural mediation and entertainment in leisure tourism and a contribution to the definition and description of a bibliotourism concept.

Keywords: Bibliotourism, Cultural Mediation, Cultural Tourism, Digital Library, Library, Tourist Experience.

JEL Classification: Z30

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[1] Universidade Europeia, Unidade de Investigação em Turismo e Hospitalidade; Universidade Católica Portuguesa; CIDEHUS-Universidade de Évora, Portugal (maria.roque@universidadeeuropeia.pt)
[2] CIDEHUS-Universidade de Évora, Portugal (dguerreiro@uevora.pt)

1. INTRODUCTION

The concept of bibliotourism (or library tourism), as a segment of the cultural tourism, is based on the recognition of the libraries as tourist attractions and of its crucial role in choosing a tourist destination. The building's architecture, the artistic bookshelves display, and the value of the collection may be offered as cultural values, determining the library as a tourist attraction. Through the ages, libraries have been considered places of interest, because of their particular architectural, artistic or historical merit. Even if visiting libraries is a longstanding tradition, bibliotourism is a recent concept and an even more emergent segment considered in the context of cultural tourism. Although bibliotourism might be related to literary tourism, it must not be confused with the latter, which involves visiting sites associated with literary creations and their authors (birthplaces, environments where they had lived or visited, burial sites). However, bibliotourism may be related to literary tourism, as far as the library's collections are integrated into literary trails. Traditionally and like other cultural heritage institutions, such as museums and archives, repositories of knowledge and creativity, libraries are committed to make their collections available and useful to their users and to preserve them for future generations. However, libraries, and most of all, public libraries have been taking other skills to deeper involvement with the community. At the same time, users are no more only presential but increasingly virtual, pressing libraries to find a wide range of communication strategies appropriated for the new publics. While traditional libraries are reinventing cultural mediation strategies to spread knowledge about those issues, namely by organising exhibitions and performative events, digital libraries, over the past two decades, have become crucial channels in obtaining information. By providing access to data through a range of resources and services in a very inclusive and ubiquitous manner, digital libraries are an essential tool to the tourism planners and consumers and play a strategic role for the newest tourist generations, and mainly for the Generation Z tourists. So, library activities and functions are examined, from the conventional book warehouse to a place of informal knowledge and active citizenship, to observe possible lines of convergence with tourism.

The central purpose of this research is to analyse the potential contribution of the libraries to improve the tourist experience as a basis to describe the emerging concept of bibliotourism. According to this purpose, this research aims to explain how libraries have historically evolved and reacted to the cultural and social circumstances, to identify possible interactions between libraries and tourism and to understand how libraries may contribute to tourist experience and to define the 'bibliotourism' concept.

From the literature review (point 2) and critical analyses, theoretical results (point 4) are presented through the historical synthesis of libraries from the conventional book depository towards the extended function of knowledge creation (4.1), to explain the relationship between libraries and cultural tourism (4.2), distinguishing their role as a tourist destination (4.3) and as a services provider to tourism, to describe the emerging concept of bibliotourism (4.4).

Considering that the cultural tourism motivations are related to learning, experiencing and understanding the place history, culture and heritage in both intangible and tangible components, libraries, as document repositories, are crucial to support the tourist's information needs and demands. Whereas the library's mission is centred on providing services, generally related to the acquisition and dissemination of knowledge, it is proposed, as a starting hypothesis, that the correlation with cultural tourism could be improved by gathering and delivering reliable information about the place and its cultural heritage. Libraries may also assist in all the travel phases, from the preparation to the place experience and its memory preservation. Public libraries are described as part of the community where

they are located, but their services extend beyond these boundaries. They are asked to increase knowledge of the territory. In this sense, libraries play a fundamental role in tourism, not only by providing services and events, mostly of free access but, above all, by promoting the relationship between tourists and residents, which are called to collaborate in the construction of narratives about of the place, its culture and its traditions. Thus, the library, while preserving and disseminating knowledge of the region, plays a crucial role in opposition to the processes of homogenisation and standardisation of offerings in tourist destinations.

Libraries contribute to local knowledge, broadly understood as the information acquired about a specific territory, a physical place or a community. It includes knowledge about history, anthropology and cultural heritage, both tangible (such as archaeological sites, monuments, historical buildings, museums, cultural spaces) and intangible (such as oral traditions, social practices, rituals, festive events, gastronomy, skills and objects or instruments therewith related). Local knowledge enhances the tourist experience, turning it more immersive in the so-called "spirit of the place", or its distinctive atmosphere. In this sense, local knowledge contributes to preserving the authenticity of the place, defined as one of the most relevant values of visitor attractions.

Therefore, the definition of the concept of bibliotourism involves the affirmation of the library as a tourism product, but it also implies libraries commitment with these specific tasks: provide cultural services and facilities; establish connections between tourists and locals; promote knowledge of the place to increase the tourist experience.

2. LITERATURE REVIEW

Cultural heritage has been appropriated by tourism (Kirshenblatt-Gimblett, 1998; Timothy, & Boyd, 2003; Timothy, 2014), while cultural heritage is perceived as a focal point of tourist attraction (McIntosh, Hinch, & Ingram, 2002; Domši, 2013; Adams, 2016; Urošević, 2019). A wide variety of cultural products emerge in tourist programming. Still, their stakeholders do not have the expertise in managing cultural heritage, which can lead to some situations of imbalance and conflict. However, tourism generates an economic and financial return necessary for the conservation and preservation of cultural heritage (Russo, & Van der Borg, 2002), while this is a relevant factor in local and regional development (Herbert, 1995; Nuryanti, 1996; Ballart Hernández, & Juan Tresserras, 2001), thus drawing the inevitability of collaboration between tourism and heritage institutions, where libraries are inserted.

In contrast to what happens with museums and heritage sites, the theoretical analysis of the involvement of libraries in tourism has been scarcely studied. Even the designation is not fixed yet, ranging between bibliotourism and tourism library.

The term "bibliotourism" has been appearing in non-scientific literature. Greg Zimmerman (2012, June 21) used it, by applying to travel through bookstores, while Sarah Anderson (2016, November 6) used it to talk about different "book-loving Portland" references. The term "bibliotourism", with the sense of journey through libraries, seems to have appeared in the 2nd half of the 2010's decade. Brenda Cronin (2016, July 19) used it in an article entitled precisely "Bibliotourism: Memorable rare-book troves", published at the Wall Street Journal, where she proposes a way through some of Europe's most relevant libraries. At an article in the Huffington Post, by Fleur Morrison (2017, June 25), "library tourism" appears in the title, while "bibliotourism" is introduced in the body of the text. After that, a non-signed post published in the digital magazine Faena Aleph, was entitled "Why practice 'bibliotourism' (and six of its most beautiful destinations)" (2018, July 23). Stephen Abram (2018, November 13), a librarian and executive director of the Federation of Ontario Public

Libraries, also adopted the term "bibliotourism", to present "7 reasons why tourists should visit the library". In the academic literature, the occurrence of the term is even more sparse, but it appears in article titles published at librarianship journals (Blasco, 2017; Adegbilero-Iwari, Owoeye, Odefadehan, & Christopher, 2019).

The expression "library tourism" is more frequently reported. When digital libraries were still emerging, Helmuth Bergmann (1996) wrote an article about returning to library tourism, but as an ironic option to the newspapers interlending problems. Alex Lainsbury (2019) wrote a chapter entitled "Library tourism" in a book which intended to provide an actual and broad view of the issues related to literary tourism. She presents a consistent analysis of library tourism "considering the role and value of a library to a destination and to the individual tourist" (Lainsbury, 2019: 106) and taking it into the wide range of possible intersections of travel and libraries. Tourism is viewed as a potential (Moiteiro, 2016; Tokić, & Tokić, 2018) or a new direction for the sustainable development of libraries (Li, & Liu, 2019).

The research in this field is at a very early stage, as well as the theoretical framework is underdeveloped. However, some case studies have been presented in the last years crossing tourism and libraries: at the library of Alexandria, in Egypt (Tosic, & Lazarevic, 2010); in Italy (Bovero, 2009); in Croatia (Smolčić-Jurdana, & Pintarić, 2012; Tokić, & Tokić, 2017) and, specifically, at the Zadar Public Library (Karuza, Krajnovic, & Volic, 2017); at the Sofia city library in Bulgaria (Yankova, & Stoykova, 2016); in Brazil (Schamberlain, & Teixeira, 2018); in Iran (Seifi, & Kazemi, 2019); in India (Dharam, & Pardeep, 2017). Even if these studies, referring restricted research fields, cannot fill the gap in a systematic review of library's fulfilment in providing tourism services in the context of the knowledge society, they offer an insight into the evolution of the library mission in this domain.

Although culture is not a global goal of the Sustainable Development Goals (SDGs) set by the post-2015 United Nations General Assembly in October 2016, the International Federation of Arts Counsels and Culture Agencies (IFACCA) and the Arts Council Malta hosted the 7th World Summit on Arts and Culture in Valletta, where 400 delegates from the arts and culture sector and representing 90 countries reflected on the theme "At the crossroads? Cultural leadership in the 21st century" (IFACCA, 2017b). One of the axes was the role of culture in sustainable development combined with the concept of alternative development. As well as in its preparatory document, "D'art report 52" (IFACCA, 2017a), which analysed the notion of cultural leadership from different perspectives, underlining how culture can play a leading role in driving positive social behaviours (IFACCA, 2017b).

The primary source of the study of the library's mission is the documentation produced by International Federation of Library Associations (IFLA), or in the context of events promoted by this international body representing the interests of library and information services and their users. In this field, the research crosses issues, combining librarianship (IFLA, & UNESCO, 1994) with access to information (IFLA, & TASCHA, 2019), digital libraries (IFLA, 2017a; IFLA, & UNESCO, 2018), and cultural heritage promotion (IFLA, 2009; Clausen, 2018, June 28), to confirm that "IFLA aims to encourage the safeguarding and respect for cultural heritage especially by raising awareness and strengthen cooperation and participation in cultural heritage activities" (Clausen, 2018, June 28) and, then, in tourism. So, libraries promote services, events and activities to tourists, as they are a large space of informal learning (Häggström, & IFLA, 2004; IFLA, 2016). The relation between libraries and tourism must be framed by the 4th Industrial Revolution challenges (Ahmat, & Hanipah, 2018). Under the IFLA Global Vision discussion, the Report of the public libraries section meeting how a united library field can tackle the challenges of the future (IFLA, 2017b) stressed the role of the libraries in promoting the availability of open access to trusted information. Kirsten Drotner, as far as 2005, had analysed the role of public libraries

in the knowledge society age, in which it is possible to consider their use as a multimodal extension of tourist information centres (Seifi, & Kazemi, 2019), bringing a new dimension to bibliotourism.

3. METHODOLOGY

Research methodology has been designed as qualitative, analysing the relationship between libraries and tourism. Qualitative research (Gorman, & Clayton, 2005) was applied as a systematic and subjective approach to highlight and explain this relationship and to give it a proper meaning.

Bibliographic research (Snyder, 2019) and subsequent literature review (point 2) conducted to form the basis of the conceptual framework presented as research results (point 4). The conceptual research was conducted by collecting, reviewing, and analysing relevant information on the topics, aiming to propose new relationships among their constructs. The published data are collected from books, articles published in scientific journals, conference proceedings and reports, publications of international bodies and their subsidiary organisations, as well as born-digital online resources like websites, blogs, and bibliographic databases.

Considering the research design as "a plan for collecting and analysing evidence that contributes to answer the question posed" (Ragin, 1994: 26), the collected literature was reviewed according to the research objectives to obtain reliable results in a reasonable and justified manner. Bibliographic research was applied to confront the term "bibliotourism" and the expression "tourism library" citations in the general and specialised press with its references in scientific journals. The authors independently analysed the collected data and then examined and articulated the results to arrive at the main conclusions.

Flick has outlined the theoretical sampling as a powerful research tool and appropriate in qualitative research (2018: 174). As well as "a theory synthesis paper seeks to achieve conceptual integration across multiple theories or literature streams" (Jaakkola, 2020: 21) and "may seek to increase understanding of a relatively narrow concept or empirical phenomenon" (id., ibid.), the literature review contributes to summarise and integrate extant knowledge connecting tourism and libraries.

4. TOWARDS THE CONCEPT OF BIBLIOTOURISM

4.1 Library: From Book Depository to Knowledge Creation

In the so-called Romance languages, libraries are designated by words from Latin bibliothēca, originally from Ancient Greek βιβλιοθήκη ("biblion", book, and "theca", deposit). So, bibliotheca was, literally, the place where books are kept. While the concept of book has spread to a broader range of data media, the library has also taken on new strategies and functions.

The Great Library of Alexandria (El-Abbadi, 1990) was founded in Egypt by Ptolemy I Soter (ca 367-282 BCE) and built until the reign of his son and successor Ptolemy II Philadelphus (ca. 308/9-246 BCE). It was as part of the Mouseion, at the palatine complex, to keep documents according to the model of Aristotle's library and his peripatetic school (Erskine, 1995), may be seen as a prototype of the functions, services and connection to a scholar community. The library, along with the deposit of books role, was a place for the creation and acquisition of knowledge. These functions have been fixed over time and

inform the actual concept of public library as a place for informal education and lifelong learning (IFLA, & UNESCO, 1994).

The 5th International Conference on Adult Education (CONFINTEA V, Hamburg, 1997), organised on behalf of UNESCO, expressed the need of:

Strengthening libraries and cultural institutions:

1. by continuing to fund museums, libraries, theatres, ecological parks and other cultural institutions, and by recognising these cultural institutions as adult learning centres and resources;

2. by promoting the conservation and use of the cultural heritage as a lifelong learning resource and by supporting the development of methods and techniques for strengthening heritage and cultural learning. (UNESCO, & CONFINTEA V, 1997: 24)

In the same vein and already supported by the Lisbon Strategy (Lisbon European Council, Lisbon, 2000), the European Commission prepared the document A memorandum on lifelong learning, advocating the reallocation of resources for the creation of learning centres in public spaces, civic meeting points or everyday use, including the library (Commission of the European Communities, 2000: 19). By then and following CONFINTEA V recommendations, IFLA launched the project "The role of public libraries in lifelong learning". The conclusions, presented at IFLA Berlin Conference in 2003, argued that libraries, as a socially inclusive space, are a crucial factor in the development of continuing education, between formal education and broader learning systems.

In a society of lifelong learning public libraries will be nodes connecting the local learning setting – whether it is of a formal or informal kind – with the global resources of information and knowledge, public libraries can therefore play a role of fundamental importance in the development of future systems of lifelong learning (Häggström, & IFLA, 2004: 3).

Since then, the need for lifelong learning is on the top of the political agenda with direct implications for the library's role in society as well as for the skills required of librarians. "In a society of lifelong learning - whether of a formal or informal nature- public libraries will be nodes connecting the local learning setting with the global resources of information and knowledge" (IFLA, 2016).

Kirsten Drotner analysed the role of public libraries along with the transformation from the information society into a concept of the knowledge society. The author argues that "libraries must move from defining their professional role in multimedia literacy centres encompassing information as well as entertainment, retrieval as well as production" (Drotner, 2005, para. 2). This mission implies an active collaboration with other civil society partners, without prejudice to the library's specialised services in collecting, organising and making information available.

In the context of the fourth industrial revolution (Industry 4.0), cyber-physical systems (CPS), by encompassing technologies for automation and data exchange, enable integration and interoperability between real-world and virtual commands. It causes a paradigm shift in the concept of network with the active and direct contribution of all participants. Industry 4.0 has an imponderable impact on the library universe and the librarian profession. "Librarians should continuously be prepared to empower people in terms of knowledge and skill capabilities, especially by making them understand how the future world of technology works and become technology literate for them" (Ahmat, & Hanipah, 2018: 62).

Automation and artificial intelligence challenge the creation of new services and new operational and communication modalities. IFLA organised a discussion on this topic (IFLA, 2017b), where was pointed out this impact on libraries core values and missions.

Libraries enable literate, informed and participative societies. When we look at the future, according to the debates in our teleconference, libraries will be trustworthy information

brokers; will do more with new technology; provide universal access to information and scholarly works, whether it be media or information we already know or new media; preserving and providing access to information in all formats and providing trusted and effective support for political and social engagement. Libraries will be advocates for and facilitators of the Fourth Industrial Revolution, where people create their own devices and objects (Church et al., 2017: 3).

Among the missions committed to the public library, there are aims related to the heritage preservation and promotion: "promoting awareness of cultural heritage, appreciation of the arts, scientific achievements and innovations"; "providing access to cultural expressions of all performing arts"; and "supporting the oral tradition" (IFLA, & UNESCO, 1994). Besides, the public library is obliged to provide information and attend to the different needs of all its users.

The public library has been compelled to promote meaningful access to information, equitably and inclusively (IFLA, & TASCHA, 2019). "The provision of access to information is the core mission of libraries. By acquiring, preserving and organising information and allowing users to read and apply it, libraries have long been at the heart of our cultural and research infrastructure" (Wyber, 2019: 17). This mission is the axis of the proposed link between library and tourism.

Considering the impact of changes on the concept of LLL, it is required to incorporate the different public profiles in the design of a library program and, so, the occasional and mutant users, such as tourists. Although the library remains centred on the local community, it extends its mission to this fluctuating and heterogeneous population, with different modes of behaviour, usage habits, as well as other skills, objectives and levels of knowledge. In this sense, tourism and, mainly, cultural tourism offers an opportunity for the dynamization and updating of library services, both in the context of LLL and in correlation with other memory institutions, such as archives, museums, and heritage spaces (Bovero, 2009).

Karen King and Martin Scarrott (1999) underlined the crucial role of the library in supporting tourism research, both by making information available and by providing research aids. At a time when digital libraries were still embryonic, they had already announced the importance of their access to updated information, namely through thesis and dissertation repositories. Tosic and Lazarevic validated these statements: "Libraries, as cultural institutions, are an important factor behind the development and improvement of cultural tourism. By digitalising their book holdings, libraries have become an important factor behind the social progress based on knowledge managed by digital technology" (2010: 109).

Recently and in a wider version of information availability, Giulia Crippa describes the library in a convergent culture framework, marked by "trasformazione delle strutture gerarchiche della conoscenza che si osservano nel passaggio tra l'uso della biblioteca come spazio fisico e tangibile, organizzata a partire dai campi del sapere della modernità occidentale, e la struttura – apparentemente priva di gerarchie – che l'accesso alle reti mondiali ci offre" (2017: 235). In this sense, it is not feasible to separate libraries and information sources from their reconfiguration on the various digital platforms, with a direct impact on the availability of information for tourism.

As knowledge-based organisations, libraries can be put into service of tourism as centres of information about the heritage, culture and traditions of their places. "The closer the libraries are to these tourist attractions and historical monuments, the more successful they will be in benefiting from this situation" (Seifi, & Kazemi, 2019: 2). Therefore, "relying on new strategies and skills for survival and evolution in the world of information, the librarians should be able to expand and promote tourism services" (Id., ibid.), combining multimodal skills with its conventional functions in the context of cultural mediation.

Multimodal competences encompass the ability to access, but also to use mediatised forms of communication; it denotes the ability to retrieve and receive but also to produce such forms of communication. And, most importantly, it signals that information is but one element in a multifaceted spectrum of mediatised expressions that also encompass entertainment, interaction and performance (Drotner, 2005, "Multimodal literacy", para. 6).

Generation Z, meaning those who were born beyond the turn of the century, are digital natives, having been raised on the internet and social media and demand more from libraries than their predecessor. Digital libraries try to correspond to upcoming demands, by "taking advantage of the increasing convergence of communications media and institutional roles to create and disseminate digital content" (IFLA, & UNESCO, 2018). Interoperability and sustainability are the key to digital libraries to improve world-wide knowledge dissemination and access. Even considering the digital illiteracy and the lack of confidence in using digital tools (IFLA, & UNESCO, 2018) by target niche audiences, digital libraries are called "to collaborate with other cultural and scientific heritage institutions to provide rich and diverse digital resources that support education and research, tourism and the creative industries" (IFLA, & UNESCO, 2018). By providing access to data through a range of resources and services in a very inclusive and ubiquitous manner, digital libraries are an essential tool to the tourism planners and consumers and play a strategic role for the newest tourist generations, and mainly for the Generation Z tourists.

Certified heritage data should be standardised to ensure adequate storage and retrieval. To achieve this, the role of libraries and information professionals is crucial in providing services such as digitisation and digital publishing, data management and preservation, content production and research assistance. "Above all, they need to understand and follow the developments in the international sphere regarding the profession to discover ways of developing and offering innovative services and products" (Vassilakaki, Giannakopoulos, & Triantafyllou, 2019). Librarians become information professionals and, as promoters of heritage knowledge for tourism, they are also cultural mediators.

4.2 Libraries and Cultural Tourism

Over the last few decades, the concept of heritage, the new meanings attributed to heritage and the analogical or virtual media in which heritage is represented, has undergone substantial change, while the boundaries between high and mass culture are blurred (Roque, 2017: 337). Tourism and, in particular, cultural tourism are agents and effects of globalisation and the processes of de-differentiation and hybridity of cultural forms (Id., ibid.: 338). Mobility and cosmopolitanism, enhanced by tourism development, also promote the empirical, collective and subjective knowledge of peoples, places and cultures, even considering the associated risk of artificiality.

Like monuments and museums, so archives and libraries hold cultural artefacts that represent a significant part of the heritage of the communities in which they operate. Library collections document the meaning of cultural heritage, its evolution and transformations, as well as textual discourses, intertextualities, narratologies, and semantics clarify the significance of its intangibility. The way how the library exploits data from the collection, in the sense of organising, processing and making information available aiming knowledge acquisition, tends to consider the increasingly large, complex and diverse audiences.

At this point, it is possible to identify some axes of the activities of libraries due to tourism: the library, or the building where it is installed, as a tourist attraction; the library's documentary resources as a source of information for tourists; cultural mediation events and activities, such as exhibitions and conferences, with the potential to attract tourists.

"Indeed, not only their collections, but also the museums and libraries themselves, including their history and buildings, are a cultural asset that can enrich local communities and, alongside other heritage attractions contribute to tourism associated with a city or region" (Loach, Rowley, & Griffiths, 2017). While the architecture classifies the library as a heritage site and, as such, a tourist attraction, the library's other two axes concern the creation of narratives that enrich the local tourist offer (Tokić, & Tokić, 2017) and enhance the knowledge about the travel destination, contributing to the place perception.

Libraries can be a factor contributing to the cultural tourism development in one region and play a relevant role in understanding the tourist destination and so in enhancing the travel experience. "When it comes to tourists, the cultural approach enables deeper, symbolic–emotional consumption of cultures rather than just meeting their needs. The approach also makes room for local people to participate in the development work of their home region" (Saraniemi, & Kylänen, 2011: 140). By providing access to the collections about the history and culture of the place, in the physical space of the library or in a virtual environment, libraries contribute to increase the knowledge of the site and support the tourist in the travel preparation, throughout the journey and in the consolidation of its memories.

The role of the library for tourism development is part of a broader plan for the cultural, economic, social and environmental sustainability. Cultural institutions, such as museums, libraries and cultural centres have been promoting the formation of think tanks, leading to the training of a group of leaders in different areas, which are reflecting on how to expand social participation and relate to community life (IFACCA, 2017a: 16). Along with community involvement, heritage preservation and dissemination are fundamental axes of cultural sustainability, combating eventual adverse effects caused by tourism in the place authenticity.

The heritage story line represented culture as temporally and spatially embedded (particular places and time periods), and cultural capital was considered to accumulate on a temporal scale. Thus, the meaning of historical stocks of culture and their importance for the future and cultural sustainability essentially concerned the continuation of this culture in a linear time perspective (Soinia, & Birkelandb, 2014: 216).

The preservation of heritage, being crucial, is therefore also a challenge facing the growing phenomenon of globalisation and, to some extent, the related commoditisation and de-differentiation (Roque, 2017). Katriina Soinia and Inger Birkeland also highlight aspects related to "human mobility (immigration and outmigration) and trade and their impacts on languages, ethnic heritage, identity, and the distinctiveness of landscapes" (2014: 216).

Despite all these assessments, recognition of the importance of cultural sustainability has had little impact on library policy and programming.

Yet to date there has been limited acknowledgment of the notion of cultural sustainability as an equal concern within sustainability policies for museums and libraries, and as a result, their work to sustain culture continues to be considered as subsidiary to demonstrating their contributions to social, economic, and environmental concerns (Loach, Rowley, & Griffiths, 2017: 187).

Concerning the cultural sustainability purpose, it is crucial to review existing policies and define new models of action (Loach, Rowley, & Griffiths, 2017), linked to the core functions of acquisition, preservation, and investigation of the collections. The purpose of cultural sustainability in the global homogenisation process is ensured to the extent that these functions are properly and properly fulfilled. The effectiveness of library activities and services related to the dissemination of heritage and culture for tourism contribute to an inevitable stimulus to the diversity, authenticity, and identity of places of destination.

4.3 Libraries as a Tourist Destination

The definition of the library as a tourist destination is not unheard-of and coincides with the very history of travel and tourism. Tour guides mention libraries as places to visit. However, they are mostly historical libraries or libraries installed in heritage buildings.

Some of them are magnificent repositories of art and culture. It is the case of the Vatican Apostolic Library, founded in 1450 by Nicholas V, the bibliophile Pope, from the libraries of his predecessors, where the immense documentary collection coexists with the works of art by Melozzo de Forlì, David and Domenico Ghirlandaio, in the Sistine Room designed by Domenico Fontana. Another example is the Laurenciana Library in Florence, designed by Michelangelo Buonarroti and with later interventions by Bartolomeo Ammannati and Giorgio Vasari. Others libraries were installed in convent spaces, maintaining the tradition of medieval scriptoria for the preservation of knowledge, such as the Casanatense Library in Rome. Some libraries were founded near universities such as the Sorbonne and Sainte-Geneviève libraries in Paris, the Trinity College library in Dublin, the Bodleian Library in Oxford, or the General Historical library in Salamanca. Still, others stand out for the importance of the collections, but also for the uniqueness of the building's architecture, such as the Royal Portuguese Cabinet of Reading, in Rio de Janeiro.

In Portugal, it must be mentioned the library of the Palace and Convent of Mafra and the Joanine library, at the University of Coimbra, both built in the 18th century during the reign of the king John V. Joanine library, named after its founder, features a great central hall decorated with elaborate ceiling frescoes, huge rosewood, ebony and jacaranda tables and gilt chinoiserie shelves holding some 40,000 books, mainly on law, philosophy and theology. Mafra library, considered one of the most significant Enlightenment Libraries in Europe, occupies a long barrel-vaulted room with wooden carved bookshelves holding about 36.000 leather-bound volumes dating from the 14th to the 19th centuries, many handbound by the convent monks. They are both tourist destinations, also due to the bat colonies who protect the books, by eating harmful insects.

In more recent times, the first Shakespeare and Company, a bookstore that also functioned as a library, opened in Paris in 1919 by Sylvia Beach. In the following decade, it became a centrepiece of modernist culture. There was possible to find literary works banished in the Anglophone world and to meet writers and artists of the so-called Lost Generation, such as Ernest Hemingway, Ezra Pound, F. Scott Fitzgerald, Gertrude Stein, or Man Ray. It was closed in 1940, during the Nazi occupation. Yet, in 1951 George Whitman opened another bookstore, Le Mistral, which also became a meeting place for Beat Generation writers, such as Allen Ginsberg, Gregory Corso and William S. Burroughs. In 1964 George Whitman renamed the store Shakespeare and Company, recovering the previous name given by Sylvia Beach. "From the first day the store opened, writers, artists, and intellectuals were invited to sleep among the shop's shelves and piles of books, on small beds that doubled as benches during the day" (Shakespeare and Company, 2016), establishing a close connection with tourism. Currently, it continues functioning as a bookstore and library with reading and lending services. The history and symbols associated with this library bookstore, especially after inspiring the film Midnight in Paris, de Woody Allen, make it one of Paris's tourist attractions on the "rive gauche", along the Seine, between the Sorbonne and Notre Dame Cathedral.

Like the historical libraries, also the recent library's buildings designed by renowned architects are poles of interest in travel routes. "The idea of architectural structures' potentially to attract attention to geographical locations is closely related to the idea of "starchitects" […]. Such structures are highly visible, easy to mediate through imagery, and thus effective in attracting tourists and capital to particular places" (Strannegård, 2016: 48). These contemporary architectures include libraries such as: the Kings Norton Library

(1992), by Sir Norman Foster and Partners', at Cranfield University, in England; the Seattle Central Library (2004), by Rem Koolhaas & Oma's, in Seattle, United States; the Library and Learning Center (2013), by Zaha Hadid Architects, at the Wirtschaftsuniversität Wien (Vienna University of Economics), in Austria; or the recent Stadtbibliothek am Mailänder Platz (Stuttgart's public library), by Eun Young Yi Architects, in Germany.

In Portugal, one should refer to the Portuguese National Library, designed by architect Porfírio Pardal Monteiro. The building is a modernist architecture reference, within the framework of the Estado Novo ("New State", or the Second Republic, 1933–1974) massive official constructions. The set, conceived as an artistic whole with impressive stylistic uniformity, is decorated by some of the prominent artists of the time (Raul Lino, Guilherme Camarinha, Lino António and Leopoldo de Almeida, among others).

These examples validate that "libraries can be visitor attractions in their own right" (Lainsbury, 2019: 106). Monumental architecture has always been a reason for a journey and remains a strong attraction for tourism. The importance or uniqueness of architecture is a pretext for travel. "To attract tourists or gain cultural status, buildings must exhibit a radical difference of some sort" (Jenkins, 2006: 196). Given that architecture is a stimulus of tourism (Kaczmarek, 2016), libraries installed in building with a renowned architecture become tourist attractions because of these external features, which are marginal to their collections, functions and services.

In a society that is increasingly focused on visuality, architecture is not a misleading argument for promoting the library as a tourist destination, not in the usual category of literary tourism (Lainsbury, 2019), but for its heritage and architectural values. The places and buildings, whose images are broadly disseminated and popularised through specialised literature, social media and, now, through the internet and social networks, acquire an iconic quality, in the sense of visual and representational sign (Hershberger, 1970). In the motivations of travel, the desire to see something extraordinary (out of the ordinary or everyday life), is complemented by the desire to see what is already familiar (Specht, 2013).

The recognition of what was already implicitly known through its representation becomes an emotional experience and creates a deeper connection between the individual and what he recognises. The possibility of seeing in situ the thing that is known by images, as visual representations (drawings, paintings, photos, prints, films, videos), is a strong appeal to travel and contributes to stimulating the decision of the tourist. "The recognisable and memorisable iconography of buildings – that is the use of images – is crucial to tourist's world. And because of architectural icons has become an increasingly popular phenomenon" (Konrad, 2010: 228). The recognition of this value provokes the wish of validating the presence in a place identified as obligatory or unmissable (a "must-see place"). So, the tourist becomes a producer and disseminator of new images.

The search for a destination for its architectural relevance stems from several factors. "Recognition value might be one of the reasons, the tourist's search for the photogenic, another" (Specht, 2013: 44). The desire to document the presence in the places visited, through textual or graphic records, has always existed and photography follows the history of modern tourism, as "recognisable or beautiful architecture help to validate the tourist, proving their presence in a destination" (Lainsbury, 2019: 107). However, in the last decade, a new trend has emerged: the selfie, a photo of yourself, taken on the visited sites and made available through social networks. "Photographs of visited sites […] are made available to a large audience in various places around the world. Travellers put their photos on social media sites almost immediately after they have been taken; they also write about their experiences in and impressions about the places they visit" (Kaczmarek, 2016: 87). This phenomenon, broadened on a global scale, generates a new information source that reinforces the iconicity of the place and increases its popularity.

To be considered as a tourist destination, the library identity may be perceived as a testimony of those who created and designed it, of the will and tastes of those who acquired and formed the collection, but also the purposes of those who, over time, sought knowledge there. The sedimentations that build the narratives of these buildings determine them as heritage sites and, therefore, as tourist attractions. However, tourism agencies generally do not recognise libraries as a place of interest, preventing them from being included in tourism development plans (Lainsbury, 2019). Similarly, they have been avoiding libraries from being included in their tourist itineraries.

4.4 Bibliotourism

In 2017, a HuffPost's article introduced the concept of library tourism, announcing, in the title, the hypothesis "Library tourism could be the next big travel trend" (Morrison, 2017, June 25). Considering the massive influx of tourists into cultural heritage sites such as museums, monuments and archaeological sites, and the resulting disorder, noise and fatigue, quiet and silent libraries appear as a viable and advantageous alternative by providing a break in an urban bustle.

Reflecting this contrast between overcrowded tourist attractions and the ambience of the library, journalist and travel writer David Laskin (2017) recounts an autobiographical experience lived in Venice on a springtime morning: by the second-floor terrace window of the Nazionale Marciana library's, he watched the crowd of noisy tourists below Piazzetta San Marco crowded into the Palazzo Ducale (Doge's Palace), while he had behind him the vast and quietly decorated reading room designed by Jacopo Sansovino, according to Titian's suggestion, with works by Tintoretto and Paolo Veronese, among others. Wondering what led him to visit libraries in Italy, where there are historical remains, architecture and exceptional works of art, he concludes: "Because, as I discovered in the course of a rushed but illuminating week dashing from Venice to Rome, Florence and Milan, the country's historic libraries contain all of those without the crowds" (Laskin, 2017).

However, the concept of library tourism is broader. It incorporates not only libraries in historic buildings or buildings with relevant heritage collections but also local and public reading libraries that have abandoned the primordial condition of heritage and depository guardians, as a space knowledge creation and dissemination of and spaces for community support. "Libraries can form tourist attractions in a multitude of ways, from their architecture, which can vary from some of the oldest within a city to strinkingly modern, to their role as both a promotor and a purveyor of cultural enrichment" (Lainsbury, 2019: 106).

Thus, "bibliotourism" means the tourist activity centred on the library, when the tourist route includes the library as a crucial and determining element, but also when going to the library is an integral part of the journey because of the information it delivers, the activities it promotes and of the services it offers, contributing to the fulfilment of travel purposes and the traveller's satisfaction.

The project "Library Planet" (vd. https://libraryplanet.net/), developed by Christian Lauersen and Marie Engberg, Danish librarians in the public libraries of Roskilde and Gladsaxe, respectively, fit this concept of library tourism. The idea came to them in November 2018, when they were talking about "how it sadly always is the big historical and architectural flagship libraries you find in travel guides and you really have to look for the minor more 'normal' libraries that makes such a huge difference in their local communities – civic as academic" (Lauersen, 2019, August 16). The project, "a crowdsource travel guide to libraries of the world" (Id., ibid.), is collaboratively developed, based on a community of contributors who share their travel experiences related to visiting libraries of any type, size and scope.

The first two libraries that were part of the project were the National Library of Portugal and the public library of Hvalsoe, Denmark. Despite the differences between typologies and objectives, they are "all united by the same values of education and life-long learning, equal access to information and knowledge, promoters of intellectual freedom and democracy, shared places for everybody and forces of social good" (Id., ibid.). The National Library of Portugal is described as "a castle or a fortress", and this feeling "is empowered by the guards you meet at the entrance", while "the bad signing gave me the impression of a library that didn't wanted me to enter and explore and I often found myself in places where I was in doubt if I was allowed to be" (Lauersen, 2018, November 24). Although the author recognises the quality of the collections and, mostly, the cartography and praises the reading room, qualifying it as "beautiful and lightful", the experience was "destroyed by the guard who shussss'ed us and showed us the exit door" (Lauersen, 2018, November 24). By contrast, Hvalsoe's public library is described as an open and welcoming space, with a dynamic and interactive relationship with the community, called to participate in its programming and to contribute its own narratives to the preservation of the local memory: "The library is organisational and physical combined with the Lejre Archive that collects and preserves materials about the history of the municipality […]. A key activity in the archive is activation of local volunteers" (Lauersen, 2018, November 25). Despite the subjective and caricatural tone, the comparative analysis of the descriptions of these two libraries suggests the confrontation between two library models, one of a heritage institution, closed and to some extent oppressive, and the other of a creative space open to the community.

However, the role of the library, whether heritage or public, has a propensity to combine both models. Following a trend that has been implanting in the last decades and that is also found in museums (Ballantyne, & Uzzell, 2011; Andersen, 2019), libraries tend to divert the centre of the patrimonial function from the object to the user, without neglecting the original role of custody and preservation of collections. Recovering the attributes identified in the Alexandria library, the library is reinventing itself, as its features and services, as a meeting place and a community civic site (Aabø, Audunson, & Vårheim, 2010; Aabø, & Audunson, 2012).

The public library is positioned not just as a place to borrow or read books or even to access digital material, but as a key community resource and facility which can act as a venue for community events and as an access point connecting individuals with one another, connecting people with their local communities, and connecting communities with wider society […] (Goulding, 2009: 47).

It is precisely from this point, concerning the connection of the local community with society in general, that the concept of library tourism develops as a new way for libraries to act. So, libraries should be considered as a tool for deepening tourist knowledge of the culture and identity of the place. As part of a recent correlational study on cultural tourism and libraries in the Brazilian capitals with the most extensive tourist influx, Schamberlain and Teixeira (2018) find that the activities developed are mainly aimed at residents and, concerning tourists, are limited to the scheduled guided tour. Tourists who want to visit the libraries must do it spontaneously. They also consider that the institutional public support is incipient, both in terms of site promotion and facilities investment. In general terms, and although empirically, these results are replicable in other contexts. The proposals presented by the authors are also valid, arguing that libraries generate a greater understanding and knowledge of the place, as well of the local history, culture and heritage (Schamberlain, & Teixeira, 2018: 103).

The presence of new audiences recruited from outside the local communities, the way tourists want to experience heritage and culture, the emergence of new communication

models, the changing paradigms of society, all these factors call on the library to reinvent itself in its functions and services.

Tourists prepare the journey and increasingly collect destination information before travelling (Tosic, & Lazarevic, 2010). Libraries can play a relevant role in this by providing credible, relevant and up-to-date information online. During the journey, the library remains a source of privileged information, allowing access to its collections in physical or digital media. On the other hand, in a context of media proliferation, it assumes an irreplaceable role in the organisation of knowledge and its availability. Notwithstanding its specificity, it can apply museographic methods, by organising exhibitions that incorporate residents' memories, narratives and experiences, increasing their sense of belonging, while helping visitors to enhance their knowledge of the local culture.

The role of libraries in the context of tourist-local intermediation involves the incorporation of the community into the activities they promote. Still, it depends on the qualifications, skills and performance of librarians (Lankes, 2017). "In terms of the development of cultural tourism, not only technical equipment and capabilities of the library but also the library staff, play an important role, primarily librarians" (Tosic, & Lazarevic, 2010: 109). Providing a quality service involves the study and disclosure of the collections, but also local knowledge, community involvement and communicational strategies, within the library and in a virtual environment. This entails new responsibilities and requirements to the librarian, as well as an update of the library's mission, where tourism must be considered.

5. CONCLUSION

The concept of library tourism and the term "bibliotourism" to designate it are still scarce, especially on academic and scientific research, even if we may report some occurrences. However, these occurrences enable to confirm an emergent trend connecting library and tourism, while that scarcity validates the novelty of the phenomenon.

The analyses of the librarianship documentation mainly produced by IFLA, a leading and renowned international body of librarians, had confirmed that libraries are focused on providing access to data and promoting access to knowledge. A library is a place of informal education and lifelong learning. Digital libraries have the potential to provide resources, ensuring the data availability and sustainability, for supporting e-learning and meeting the new generation's requirements.

The missions of the library concerning not only the preservation but also the knowledge dissemination, committed with the ongoing transformation of society, allow us to confirm its potential to supply services to new and enlarged audiences, which include tourists. The library also sees itself as a cultural mediator between residents (contributors to knowledge), and tourists (receptors of the information produced), creating new dynamics in the perception of the tourist destination. Therefore, the research hypothesis is valid, by confirming that the services provided by the library underlie its relationship with tourism, with relevant benefits. By increasing the knowledge of the local, it enhances the sense of place and, so, the quality of the experience, more immersive and memorable.

The concept of bibliotourism (or library tourism) involves two complementary, but not necessarily simultaneous, aspects:
- Library as a tourist destination, when the building where it is located, as well as its collections, are recognised by their cultural heritage value;
- Library as a tourist information office, when the cultural mediation services provide strategies for the site knowledge and interpretation, including the integration of residents' memories and narratives.

The library assumes a specific role in the context of cultural institutions by promoting the identity of the place and the peculiarity of its cultural manifestations. So, the library may act against the globalisation and homogenisation that tends to characterise contemporary tourism practices. In turn, the recognition of the library mission, roles and functions could have practical implications on the tourism industry, while offering additional interests and services that enhance tourist experiences.

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INDUSTRIAL TOURISM AS A MEANS OF "MADE IN CHINA" REPUTATION IMPROVEMENT

Olga V. Novoselova[1]

ABSTRACT

The article discusses the development of industrial tourism as a way of country-of-origin promotion. The paper presents a study which focuses on determining the current situation of industrial tourism, and the peculiarities of international communication strategies in promoting industrial tourism in China. The methods of online international communication in promoting industrial tourism in China were analyzed in this study, specifically Shanghai's strategy of promotion was chosen where 17 industrial tourism examples received additional governmental support and advocacy. As a result, it was found that the mechanism of international promotion is largely related to existing standards, new communication technologies are used in limited ways, and all the provided information is mostly not adopted for international target audiences. The analysis is made on the basis of theoretical and empirical data, both available by free access and the author's data. The methods of data collection are analysis of scientific literature and content analysis of Internet sources.

Keywords: Industrial Tourism, Marketing Strategy, Made in China, Reputation, Country-of-Origin.

JEL Classification: L83, M31, Z32

1. INTRODUCTION

According to the plan "Made in China 2025" declared in October 2015 as a roadmap for the future of the country's manufacturing sector, its purpose is a turnabout of China into a manufacturing superpower. Beijing is supposed to donate somewhere on the order of $US300 billion to that goal. This roadmap encompasses such emerging industries as robotics, the manufacturing of autonomous and electric cars, artificial intelligence, biotech and aviation.

China has been the "world's factory" for years, but it has mainly produced low-end products. "Made in China" is associated with cheap wares and low quality (Fang & Walsh, 2018). Chinese producers are known to have well–known problems in categories such as dairy (Orr, 2008) and automobiles, which likely have had a negative effect on brands associated with China. One survey of international customers has shown that in many product categories many more respondents thought more highly of Indian brands than Chinese brands (Wang & He, 2014). Recent studies have shown that, with respect to perceived quality, China often lags behind other countries or regions, such as Japan, the United States, Europe and South Korea (Kumar & Steenkamp, 2013: 115-122).

It is obvious that the first step should be improving the "Made in China" reputation, for reaching the aim of roadmap. Industrial tourism could be the mean by which improving the reputation of product quality image could be made. Industrial tourism is a potentially

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[1] Corvinus University of Budapest, Hungary (novoselova@uralbrand.ru)

developed sector that is congruent with country identity: the sector offers opportunities to strengthen a county's distinctiveness and image, notably by building on their existing assets.

Besides, there are great examples of European and American industrial cities which, since 1950, have had industrial recessions, and the competitive performance of their cities has diminished. Concerning the issue of looking for the potential to improve the situation, some industrial cities during the period of recession considered urban marketing as a way to redesign the city image, and to engage investment and tourism to those cities (Kavaratzis, 2007).

This study provides insight into the essence of industrial tourism and its opportunities for country-of-origin promotion, as well as presenting the situation of industrial tourism development in China, and the communication strategies used in industrial tourism promotion, and its application in China.

2. LITERATURE REVIEW

The development of industrial tourism started in the 50s, but only in the 1990s has industrial tourism been gradually recognized by government departments and the public and became a part of tourism research.

Nowadays, it has been acknowledged by many scholars as an increasingly significant field of the tourism industry. It seems to be one of the newest forms of tourism that has egressed due to increased demands in reaction to the emerging notions of individualization and differentiation in tourism (Nylander & Hall, 2005; Robinson & Novelli, 2005).

However, since it is a relatively unexplored research area, there is a lack of clear concepts and definitions, and it leads to different meanings. The rise and development of industrial tourism mainly was related to industrial heritage tourism and factory sightseeing tours (Hospers, 2002) where the primary goal was to show off the security and reorganization of machinery, plant buildings in an old industrial site, in order to assist tourists to be acquainted with the industrial culture and civilization of the area. Frew (2000) defined industrial tourism as "visits by tourists to operational sites where the core activity of the site is non-tourism oriented".

Meanwhile, in some countries, industrial tourism is mainly about visiting operational firms, while in other places it refers to visiting industrial heritage (non-operational firms), or encompasses both meanings. In Germany and France, for instance, many people associate industrial tourism with industrial heritage, and not with visiting operational firms (Otgaar & al., 2010). Concerning this notion, in Chinese tourism literature, the wider application was considered to focus on such phenomena as "industrial heritage tourism" and "industrial tourism". Nevertheless, "industrial tourism" acquired a specific meaning, mainly relating to "industrial production tourism" or "factory sightseeing tourism" (Huang & Zheng, 2015).

It should be mentioned that most definitions are given concerning the reasons of being engaged in industrial tourism. A 1992 survey of company visits in the UK showed that the most important reasons are (1) to improve their image, (2) to improve the working morale and (3) to reap an extra income (Frew, 2000). Thus, Yale (1991) defines industrial tourism as the presentation of contemporary manufacturing processes; whereas Li and Soyez (2006) present a two-dimensional model for categorizing industrial tourism products, with the horizontal axis indicating the difference between heritage and market (operational firms) and the vertical axis going from locations to destinations. Company visits combine a location with the market, whereas brand parks are examples of destinations in the market. Chen and Morrison (2004) state that enterprise sites also provide opportunities to learn about production processes: they are an integral part of industrial tourism. Frew (2008) accepts

industrial tourism as one of the types of tourism attractions and, therefore, it differentiates from other types while considering the organization's "core" business, that is, the principal reason the organization is in existence, or the central, or essential part. Richards (1996) considers shows of industrial environments for tourists as a promotion tool in hope that the tourists would then like their brands more and thus allow them to reap greater revenues.

However, there is almost no study which would relate this type of tourism with the country-of-origin brand, and look at industrial tourism as a way of involving customers in the product experience process. Meanwhile, involvement theory suggests that consumers who have witnessed the production of a good become more brand loyal (Chow et al., 2017). According to study made by Quester and Lim (2003), the level of involvement with the product is above average in this case if a favorable brand attitude and level of commitment to the brand are higher in comparison with a lower level commitment. In addition, true brand loyalty is also apparently stronger in the case of above-average involvement. On the other side, a lack of true loyalty occurs in the condition of below-average involvement, less favorable brand attitude, and lower commitment.

In tourism, product involvement is determined as "the interest or motivational intensity toward a vacation place with behavioral consequences" (Lehto et al., 2004: 805). Due to the fact that involvement is related to the significance and appropriateness of a product to an individual, it reverberates on a consumer's decision making concerning involved products. It is worth mentioning that studies devoted to the relationship between involvement and satisfaction (Kim, 2008), service quality (Hwang et al., 2005), opinion leadership (Jamrozy et al., 1996), consumer loyalty (Kim, 2008) and motives (Josiam et al., 1999; Kim, 2008) have been conducted and this relationship has been proved. Lin & Chen (2006) also distinguish in their research that consumer purchase decisions under different product involvement was positively affected by the country-of-origin image.

Thus, due to the fact that industrial tourism is engaged in delivering product knowledge and consumer's involvement in the way of developing tourist attractions, it could be seen as a way to increase the country-of-origin's image by enforcing product involvement events. In this case, special attention should be paid to marketing strategies where the special forms of attracting sites and communication technologies should be applied to succeed in promoting country-of-origin image. For instance, the application of Charles Osgood's theory could provide the opportunity not only to measure the influence of the country on the customer, but as well to analyse the perception of the products and present the ground for further improvement of marketing acivivties (Nagashima, 1977).

It is not a secret that the development of industrial tourism depends on promotional activities, as well as information and communication technologies. Their increasing use has radically changed the relationship between the destinations and their visitors. In modern society the growing role of web sites and social media in tourism is undeniable; leveraging social media to market destinations has proven to be an excellent strategy. The vast majority of authors emphasized the main advantage of the Internet as a valuable communication medium in the area of hospitality and the tourism industry (Desai & Eric, 2015; Schuckert et al., 2015). Thus, this industry is unavoidably affected by up-to-date business environments created by the diffusion of communication technologies and thus, tourists become co-marketers, co-designers, co-producers and co-consumers of travel and tourism experiences, which is absolutely relevant to industrial tourism area (Sotiriadis & Zyl, 2017). Therefore, these technologies and social media are now crucial in the process of tourism industry growth, which is defined as high in customary qualities that consumers face as obstacles to assess attributes before purchase (Ban et al., 2015). It is worth noting that exactly the travel and tourism industry is more dependent on word-of-mouth marketing than any other sector due to its intangible and perishable service nature.

The purpose of this research to investigate the methods of applying industrial tourism for the purpose of improving "country-of-origin" image, using the experience of China and evaluate communication strategy launched in the aim of attracting visitors for industrial sites.

China was chosen due to the fact that it is highly engaged in promoting the development of industrial tourism, and is planning to create 100 bases at the state level by 2020. As a result, its industrial tourism rose in the 1990s with a late start but 140 million visits to Industrial sites are distinguished, and the industrial tourism annual income attained 21.3 billion yuan in 2017 (Fan, 2017). To make the scope of research narrower, Shanghai's strategy of promotion was chosen to be analyzed, since 19 industrial sites were nominated to be included in the "National Model of Excellence", where additional government support and advocacy are provided to become industrial tourism examples.

3. METHODOLOGY

Based on inference of some researchers (McEwen, 2005), the country-of-origin directly influences the positioning of its products. Country-of-origin reputation is designed to attract consumers, tourists and entrepreneurs, in a way of providing experience and is merchandise itself, regarding industrial tourism promotion (Kotler & Armstrong, 2004). In this vein, the lack of this mechanism applying a positive impact on the country-of-origin leads to constraints in exploiting their full potential, and reshapes competitive advantage around the countries in the world (Moilanen, 2008).

Therefore, the major purpose of this research is to investigate marketing strategies of positioning products in industrial tourism promotion, which can be identified with the country.

In order to examine the phenomena related to efficient communications with target audiences, Charles Osgood's theory, modified later by W. A. Mindak, was chosen to be applied in this study (Nagashima, 1977). It is going to be comprised of categories since it is the first step in the research, and it is going to be implemented according to literature analysis, describing the promotion process of industrial tourism in Shanghai, and content analysis of online communication used for spreading information about industrial sites. The categories are: Advertising and Reputation, Design and Style, and Consumers' Profiles. The study is focused on getting data on how China is using its current positioning to change or to strengthen its "Made in China" reputation.

Shanghai case in industrial tourism development was chosen to be analyzed for the reason of being considered as a model of excellence where additional government support and advocacy have been provided to become industrial tourism examples. It is also China's largest industrial center and an important international industrial city with a large amount of industrial resources.

With the purpose of worldwide promotion of industrial products, the Shanghai Industrial Promotion Center (SITC) was created for marketing chosen sites. The first industrial tourism development plan in China included the "Shanghai Industrial Tourism Development Plan 2006-2010" and according to the plan the major focus encompassed such industrial tourism examples as: Baosteel, Shanghai Volkswagen CO. Ltd., Shanghai General Motors, Yakult, Free-trade zone, R & D park, Zhangjiang High-tech park, the Bridge 8, Tianzi lane, M50 Creative Park, Industrial Park of Tobacco Group Shanghai, ship-building museum, Maglev, East-sea Bridge, Junmao Tower, Sony gallery, Oriental Land (Otgaar et al., 2010). Therefore, websites, social media pages of Shanghai China Travel, SITC and 17 selected industrial sites were chosen for further content analysis, as well as, the search of other possible sources of

medium was launched based on such searching requests as "industrial culture", "industrial tourism", "visit industry in Shanghai".

To systemize the information on defined website content analysis was applied due to the fact that this type of analysis is an appropriate method when the phenomenon to be observed is marketing communication, rather than behavior, or a physical object (Malhotra, 1996). This study carefully followed the procedures recommended in content analysis literature (Harris, 2001). One of the most fundamental and important decisions is the determination of the basic unit of provided information to be classified (Weber, 1990). Six units that have been commonly used in content analysis literature are word, word sense, sentence, theme, and whole text (ibid.). The main codes were connected with central elements of industrial tourism and product information on the websites and social media channels.

This research will start with an analysis of the marketing strategies in the first variable – Design and Style, where the range, size and models of chosen industrial sites in Shanghai will be determined and matched with the purpose of "Made in China" promotion. Then, looking at consumer's profiles, it will be possible to indicates the age, culture and income of the target audience visiting Shanghai's industrial sites. The Advertising and Reputation variable will help us to distinguish the main communication tools used in disseminating information, and if new technologies are used in this process. It is necessary to stress that one of the limits of the paper is that it mostly focuses on the first local industrial tourism development plan, namely "the overall layout of Shanghai's industrial tourism development (2006-2010)", and the marketing strategy which has already been implemented.

In concordance with the results obtained, it will be possible to make deductions and suggestions on the issue of strengthening a new strategy in order to improve the "Made in China" reputation, while developing industrial tourism promotion.

4. RESULTS

The first industrial tourism development plan in China, the "Shanghai Industrial Tourism Development Plan 2006-2010", provides a geographic and thematic overview of Shanghai's industrial tourism resources, with seven main areas and corridors of industrial tourism development. The zoning of these development areas is largely similar to the layout of the city's most important industrial clusters (Otgaar et al., 2010). According to the plan, the city considers industrial tourism not only as an instrument to improve Shanghai's image, but also as a way to make the development areas more attractive and to lively by realizing a mix of functions and additional sources of income. Therefore, the Shanghai Industrial Promotion Center (SITC) was created with a mission to develop a more integrated industrial tourism product, and to improve the marketing and promotion of this product.

4.1 Design and Style

Thus, the following industrial attractions were opted to be industrial tourism examples in the first development plan: Baosteel, Shanghai Volkswagen CO. Ltd., Shanghai General Motors, Yakult, Free-trade zone, R & D park, Zhangjiang High-tech park, the Bridge 8, Tianzi lane, M50 Creative Park, Industrial Park of Tobacco Group Shanghai, ship-building museum, Maglev, East-sea Bridge, Junmao Tower, Sony gallery, Oriental Land (Otgaar et al., 2010).

Looking at the chosen attraction sites, we can see that the priority is given to the industrial heritage direction, and that such sites mainly support the purpose of country image building as regards an international audience, since there are not many sites specifically focused

on product promotion. However, some sites can be defined as ones connected with the possibility of country-of-origin improvements and enforce customer involvement. They are Baosteel, Shanghai Volkswagen CO. Ltd., Shanghai General Motors and Yakult. With the popularizing of the Shanghai Volkswagen site, the marketing strategy gives a contribution towards strengthening the foreign brand Volkswagen, which is mainly associated with Germany. The same situation occurs with Shanghai General Motors, which is, in fact, a merger of GM (General Motors) and SAIC (Shanghai Automotive Industry Corporation). They produce the automotive brands Chevrolet, Buick and Cadillac for the Chinese market. The same situation is with Yakult, the world's leading probiotic beverage, created in Japan in 1935. Therefore, these companies are mainly interested in their internal audiences, and will not make big contributions to country-of-origin reputation improvement. The only national band represented in this industrial tourism plan is Baosteel, also known as Baowu, a state-owned iron and steel company headquartered in the Baosteel Tower in Pudong, Shanghai, China. This industrial attraction site could be used in developing contributions to the "Made in China" reputation improvement and strengthening its product and company image.

4.2 Consumer Profile

According to the classification of industrial tourists by SITPC, there are six main target groups: 1. Students; 2. Nostalgic visitors; 3. Business visitors; 4. Neighborhood visitors; 5. Young visitors; 6. Families.

Concerning the data provided by The Shanghai Industrial Tourism Promotion Centre, more than 6.15 million visitors were elicited to attend in 2006. However, it constitutes a mere of 6.4% of the total quantity of visits to touristic sites (SITPC, 2007a). In reference to places where visitors were attracted, the Maglev train and the Jinmao Tower were included which, in fact, didn't relate directly to industrial factories, but mainly present entertainment sites as parks, museums and even industrial landmarks. Eighty thousand visitors a year were attracted to Baosteel, 100000 of them to Shanghai Volkswagen, approximately 12000 tourists visited the M50 Creative Park and 70000 viewers attended Yakult (Otgaar & Klijs, 2010).

As a result, around 70% of these visitors are pupils, students, pensioners and leisure visitors, and the share of single leisure visitors is very small. Thirty percent are professional visitors. Around 75% of all visitors are locals and Chinese citizens; the other 25% are foreigners from such countries as Japan and other Asian countries.

Eleven-point eighty-three hundredths percent of the sites only receive groups, while the rest receive groups and individual visitors. Thirty-two point thirty-six hundredths percent receives people who book a tour at least one week in advance. This shows that the necessary popularizing information should be online so people who are planning to visit Shanghai and sites of attraction should know this information.

Concerning the results, company visits are more popular around the target audience then the traditional way of attractions, which is aimed at industrial heritage popularization. However, the target audience for promoting the country-of-origin image constitutes 30% of professional visits, which are not really clear since 75% are Chinese citizens. It is obvious that for improving country-of-origin image, the target audience should be internationally focused. So, if there are approximately 25% of foreigners and not all of them have a business purpose, we may conclude that the appropriate audience according to our research issues is absolutely limited.

At the same time, due to income, such groups of visitors as pupils, students and pensioners are not high representative groups for reaching the necessary goal because the higher the income, the more people are spending on luxury and innovative products (Aaker, 1991).

4.3 Advertising and Reputation

Based on the developed marketing plan, Shanghai pinpointed just three types of theme routes to be promoted for various target groups. The nostalgic elderly was defined as the first group with proper propagation activities aimed to attract to touristic sites. The second one includes young students who are supposed to carry out research-related activities, and in this way tend to be attracted to a particular site. Finally, business was considered to be the third group where they were provided travel products for government, business, cooperation, as well as, other survey groups (Wang & Fu, 2019).

To reach the defined target groups, the following communication tools were chosen: the annual industrial tourism ticket book, visitor package and tourist routs, and a data-sharing system. The annual industrial tourism ticket book is a voucher-book that allows the free of cost visit of industrial tourism attraction which was promoted as an incentive program for employee of local companies and can be observed as a communication tool concentrating on internal target audience (Mianyang Tourism Bureau, 2010).

At the same time, national and, probably, international promotion is supposed to be done by 28 travel agencies in Shanghai that signed strategic cooperation and promotion contracts with SITPC, as well as, center may organize any promotion campaign also. Though, one of the target group is claimed to be international audience, whereas the materials on SITPC web site are provided in Chinese language.

Paying attention to Baosteel industry, as this site is the one type related to the purpose of country-of-origin promotion, it is mainly promoted by the Baosteel Travel Agency.

Recognizing the potential role of the Internet and social media in influencing decisions about visiting destinations, online promotion was investigated. No specific website or any social group which would acquaint target audience with the industrial culture of Shanghai or even China was found. The official Shanghai China Travel website, despite the fact of it being the "Industry voice" page, doesn't provide any exact information related to any industrial attraction site. On Facebook, there is only one official group represented by the and the main information is devoted to coming events, there are not any special videos or photos which would concentrate attention on industry promotion.

5. CONCLUSION

A key point made from the outset was that there is an extensive body of literature within each of the country-of-origin and industrial tourism fields, but also that research attempting to link them is rare and mostly conceptual—and that research integrating communication strategy with its product and tourism components is virtually nonexistent. Thus, such an integrated approach to country-of-origin or industrial tourism has never before been supported empirically. Yet, in practice, several countries are taking steps to coordinate their country-of-origin images across various contexts. For instance, breweries are still popular destinations throughout the world; in Scotland numerous tourists visit the famous scotch-making breweries (McBoyle, 1998). In addition, vineyards and breweries are popular in Italy, Spain, Germany, the Czech Republic and Hungary as well (Gyuricza, 2008; Van Westering & Emmanuelle Niela, 2008; Michalkó, 2010).

Before marketers can successfully integrate the various elements of product country image, they need to know whether industrial tourism and product images interact in the minds of target consumers, and if so, how.

The goal of this study was to contribute to knowledge about industrial tourism and country-of-origin by applying Charles Osgood's theory as an effective model that encompasses both the product and tourism sides in the way of developed communication strategy.

The emersion of industrial tourism provides opportunities for industries, and the regions in which they are located, and should be accepted as a source of income and employment, but more importantly, as a marketing and public relations tool. Such forms of tourism emerged for making concentration narrower in promoting tourism. It is not just a fresh occasion to create new types of tourist attractions, but it reflects a deeper approach to this area. It is a new way of building communication strategy between business and society in our modern technological world. Industrial tourism can be an effective tool for co-branding the region, industry and its products, notably by involving customers in getting product knowledge.

Therefore, when a country develops its industrial tourism, it should not only consider the incomes coming with the flow of tourists, but include product brand image and the country-of-origin image, while developing the most appropriate competitive marketing strategy. Especially in the case when country-of-origin image should be improved, then a company's marketing strategy should focus on the attribute of a product's features. Execution of a series of marketing activities helps a consumer to better understand the advantages of a product, in order to change a consumer's product evaluation principles.

This case study analysis of two streams of research conflation that have had little communication interaction with each other has resulted in helping to untangle a concept that has often been treated narrowly within industrial tourism: adding support for the role of marketing strategy in industrial tourism and product country image, and exploring the crossover relationships in marketing strategy between industrial tourism and country product.

Even though the Shanghai method of development in industrial tourism is seen to be a model of perfection in promoting industrial attraction cities, in fact, it fails in distinguishing industrial tourism sites from the bunch of other touristic sightseeing. The purpose of improving the industrial image of the country is not followed. It can be explained with the way sites are chosen, which are totally concentrated inside the interests of the national market. The result, when 70% of these visitors are pupils, students, pensioners, and 75 % are national citizens, is explained according to the types of promotional materials used in the popularizing of industrial attraction tours.

In this century, while new technologies have conquered our world, the usage of the Internet and social nets are limited in industrial tourism. Nowadays, potential tourists are able to take a look at destination websites; so, these websites are vital advertising channels. The official websites are not the only ones at potential tourists' disposal. However, they are the ones that officially represent the cities and industries. and have the most impact on visitors. Thus, the more attractive and useful an official destination website is, the higher likelihood of a potential tourist turning into an actual tourist. Social media is a word-of-mouth tool disseminating information very quickly, and providing opportunities to talk about an attraction to a huge number of participants and future visitors.

It is worth saying that the mechanism of the international promotion industrial tourism in China is largely related to existing standards concentrating on national citizens; new communication technologies are used in limited ways, and all provided information is mostly not adopted for the international target audience.

The results contribute to both the theoretical foundations and practical analysis of tourism and product country image. For researchers, the results shed the light on the theoretical background that could be involved in the process of increasing the country-of-origin image. For practitioners, the analysis contributes to strengthening image-based branding strategies and suggests that tourism marketers consider associated product strengths, and possible product affiliations, as a means of leveraging industrial marketing campaigns. To benefit from these associations, tourism marketers might consider how exports are positioned and in what markets, and build industrial tourism marketing campaigns to exploit this relationship. For

national place marketers, this case study analysis can guide strategic development at a more macro level, by attracting their attention to distinct influences of place image components, and the relationships between product and industrial tourism beliefs and behavior. This more holistic approach can reduce incongruence among various parts of product country image, and lead to a higher synergistic value from public expenditures on industrial tourism marketing.

Due to the fact that this study is the first to examine the conflation of industrial tourism and country-of-origin through marketing strategy empirically, it also has limitations that may constrain the generalizability of the findings, but also point to possible future research avenues. One limitation is the choice of sampling location and target product origins and industrial tourism. On the one hand, China announced the strategic plan in developing the industrial tourism sphere but, in fact, there is little information provided to an international audience. Consequently, there was the lack of data on the marketing strategy in Shanghai's development of industrial tourism, in particular due to the low level of new technology usage in the process of promotion. On the other hand, the possibility of different sample and target country combinations is very high, especially if the context chosen in future studies differs substantively from the present one. Overall, further research may be followed in more theoretical base, joining theoretical models in developing an integrative one and apply it in distinct country contexts —with beneficial results either way for both researchers and practitioners.

This case study analysis will hopefully stimulate the interest of other researchers toward more advanced and in-depth studies of industrial tourism and country-of-origin, and their relationship through marketing strategy.

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Authors

Artur Fernando Arede Correia Cristovão
Dália Guerreiro
Dília Cristina dos Santos Rafael Nunes
Joana de Carvalho Folgado Lessa
Leonardo Xavier da Silva
Marcelino de Souza
Maria Isabel Roque
Tissiane Schmidt Dolci
Vander Valduga

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