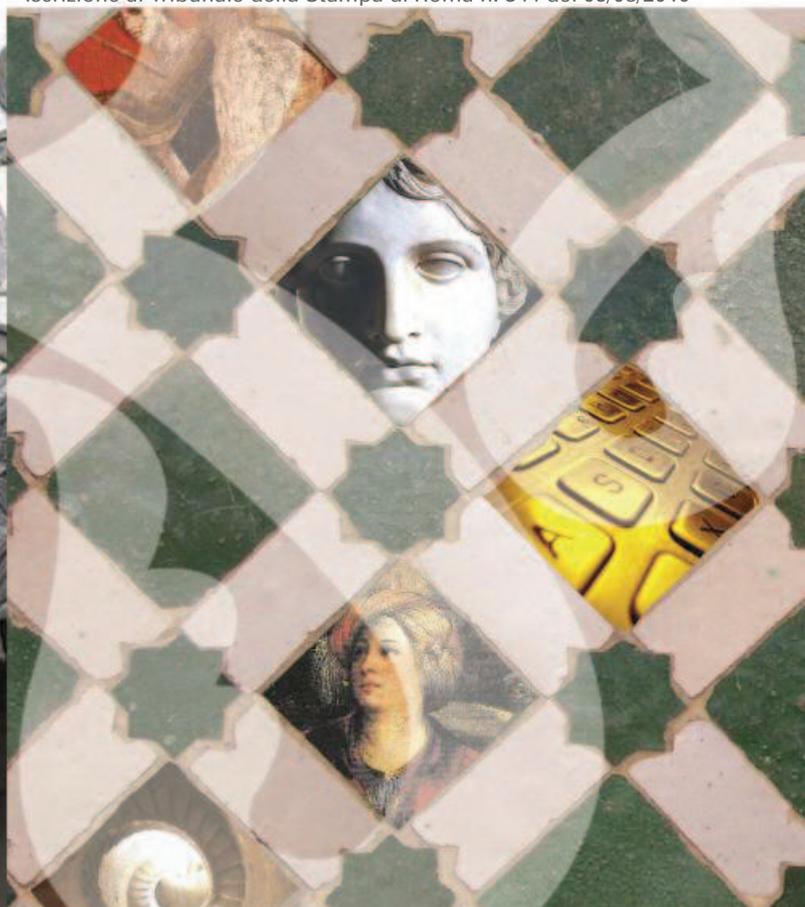




Centro Universitario Europeo  
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# Territori della Cultura

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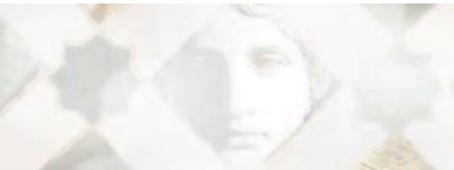
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# Some challenges facing the Tourism industry: a focus on the Amalfi Coast

## Preface

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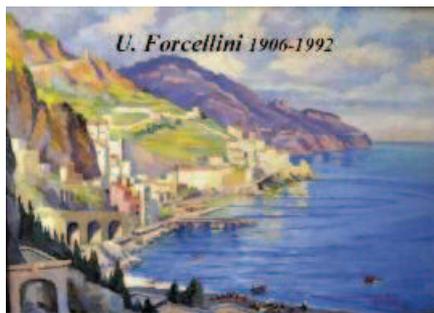
The tourism industry faces many challenges. Behind many of these is the increase or decrease in tourism demand, and the subsequent effects this has at the destination. The impacts of tourism, both positive and negative, are felt by many different stakeholders at the destination and beyond. From local residents to business owners, through to service providers and the public sector, many livelihoods may be affected by or dependent on tourism. Due to the relevance of the challenges and impacts of tourism at destinations worldwide, it is important that today's students of tourism, the future managers, have an understanding of the issues and potential ways to overcome challenges. This assignment was set with this in mind, with students being free to discuss a destination of their own choice. The example that follows reflects the issues of importance for the Amalfi Coast.

## Abstract

The original version of this report was written for the purpose of delivering the requested assignment set by my Professor Adele Ladkin for the unit "Tourism & Hospitality Principles and Practice" at Bournemouth University. This version, slightly changed from the original, is divided in two parts, however some aspects of the first part are related to the second. In the first section I have analysed the challenges (overbooking and seasonality of tourism demand) that affect the accommodation sector. The link between the two parts is the seasonality; considering its importance, this report discusses different strategies that help to face this challenge. In the second part I have analysed an Italian destination – the Amalfi Coast – and the main impact (traffic congestion) that affects it. In order to make my suggestions concerning what might be done to maximise the benefits and minimise the costs of tourism activities, I used and adapted a model - the *Cultural Heritage Territorial System* – that incorporates the *Viable Systems Approach* and *Service Dominant Logic* studies.

## 1. The accommodation sector

According to the UNWTO, tourism is a movement of visitors to countries or places outside their usual environment for a



Ulderico Forcellini (1906-1992)  
A view of the Amalfi Coast



personal or business-professional purpose. The visitors may be either tourists or excursionists and tourism has to do with their activities and associated expenditure. Tourist movements often require accommodation, which is extremely important for every destination. Lodging only involves tourists, as differentiated from excursionists, because it needs to involve an overnight stay. The hospitality sector is interlinked with other sectors of the tourism industry, such as transportation or attractions. Considering the UNWTO's prediction (2013a), by 2030 the number of international tourists will be 1.8 billion meaning there will be more people that will spend disposable income during free time. As a result, the demand for accommodation will increase and consequently also the needs for transportation and entertainment (or attractions) will grow. In the future, more facilities will be needed along the travel route due to increasing demand (Pearson 2013).

In some instances the accommodation sector might be seen as part of the overall tourism infrastructure, without which tourists would not visit the location (Brotherton and Wood 2008). The first thought related to the lodging sector invariably is about hotels, but this sector includes a broad range of accommodation establishments such as: motels, inns, (youth) hostels, guest-houses, pensions, boarding houses, bed and breakfast operations, taverns, lodges, hydropaths, sanatoria, apart-hotels, holiday camps, cottages, timeshares, cruise liners and ferries, trains and aircrafts (Brotherton 2003; BPP learning media 2009). Considering that hotels play an important role within accommodation and they are diverse, there are several ways to classify them through various segmentation techniques: by scale, by location, by size and by type of customer (Adner 2003). In order to avoid confusion, I will use the chain hotel segmentation by scale. In this classification hotels are divided in six categories: independent hotels, economy, midscale (with and without food and beverage), upscale, upper scale and luxury (PwC, 2013). What follows is a consideration of some trends (e.g. the growth of budget and boutique hotels) and challenges (e.g. overbooking and seasonality) that characterise this sector.

### *1.1 The challenges in the accommodation sector*

In a globalised era there are many challenges in each market, hence also in the tourism industry and also in the accommodation sector. In the lodging sector the most common two are overbooking and seasonality. In addition to these there is



another important challenge that needs to be taken in consideration: the globalisation of market. Rather than this much used word I prefer the concept of glocalisation where the main idea is “*Think globally, act locally*”.

#### 1.1.1 Overbooking

Technically overbooking, or walking, is a non-pricing tool of revenue management. It is based on some assumptions:

- Some of the customers that have booked rooms will not appear for check-in (so called “no show”);
- Other clients will cancel or change their reservations last minute;
- Others will break in advance their stay in the accommodation (e.g. due to illness, bad weather, traffic or other reasons).

In order to face this challenge and avoid loss, managers confirm more rooms than the available capacity. Acting in this way they hope that the number of overbooked rooms will match the number of no-shows, last minute cancellations and amendments (Ivanov and Zhechev 2012). This tool needs to be used carefully because it might cause customers dissatisfaction if the number of overbooked rooms is higher than no-show ones. In the next years maximisation of profit, balancing 100% room occupancy with overbooking, will represent a challenge for hospitality companies. How could managers face in a winning way this challenge in the next years? They should follow these tips:

- Calculate correctly creating an overbooking strategy based on an overbooking ratio;
- Avoid walking for loyal clients or groups that have meetings in their accommodation;
- Book a room at a partner hotel, offer to walking customers special vouchers or meal deals in order to minimise damage to hotel reputation (Cummins 2013).

#### 1.1.2 Seasonality

This concept is related to the tourism demand that is generically high during some months and is low during others. Seasonality can slightly vary in each segment of tourism but it has a negative influence, so it can be considered a challenge with respect to all kinds of accommodation and above all destinations. There are different factors that cause the seasonality of demand: physical (e.g. weather or geographical location) and socio-cultural (e.g. holiday pattern or sport activities) (Butler and



Mao 1997). There are a lot of strategies to face this challenge that can be classified in the following four categories (I am only going to give an example for each one since I will discuss more about them in the second part of this report):

1. Differential pricing (e.g. seasonal pricing);
2. Diversified attraction (e.g. facility or structural development);
3. Market diversification (e.g. marketing campaigns to attract different markets in different seasons);
4. Facilitation by state (e.g. development of local business networks and partnerships).

Many of these strategies should be implemented by destinations and not individually, but in the future, in order to face this challenge and compete, hoteliers too must apply them.

## 2. The Amalfi coast (Italy)

The Amalfi Coast is a tourist destination located in Campania, a region in the southern part of Italy. The tourist boom of this place occurred at the end of eighteenth century thanks to the Grand Tour travellers. The discovery of Amalfi Coast was due to the building of the new carriage way and to the cultural change in the concept of beauty and landscape (Piscitelli 2011). Its territory includes thirteen municipalities (see figure 1) that are crossed by the State road Amalfitana 163 (SR 163); this road has been built on the old carriages and it is the only one that crosses this destination. For this reason I will consider this aspect as weakness due to its congestion. Just analysing the name it is evident that it is a coastal destination due to its geographical position in the southern part of Naples, and the municipality of Positano has been awarded with the “blue flag” for the sea water quality and the facilities that it offers to its tourists<sup>1</sup>. Furthermore the Amalfi Coast is also a rural destination because there are a lot of natural resources, such as the State natural reserve called “Valle delle Ferriere” and the Regional natural park of Monti Lattari. Moreover the Amalfi Coast has been listed in the World Heritage List of UNESCO since 1997. Taking into account these considerations, the Amalfi Coast can be considered a multi-type destination because it has the characteristics of both coastal and rural destinations.



Fig. 1 The Amalfi Coast and the State Road 163.

Source: Google Maps 2013.

<sup>1</sup> For more info about this award and its criteria check this website: <http://www.blueflag.org/>.



The Amalfi Coast has conflicting aspects that characterise its tourism demand. It has several resources as strengths, but at the same time it has some weaknesses (lack of infrastructure and organisation) that impact negatively on the industry. Another interesting aspect, which can be critically analysed, is the seasonality of demand.

After underlying the resources and the many strengths of this destination, it is important to analyse its weaknesses. Firstly, as previously mentioned, there is a lack of infrastructure because there is only one road to access the destination: the SR 163. This road is very winding and narrow, during the high season of tourism demand it is prone to congestion. Most of the traffic jams are due to coaches, above all those longer than twelve metres which are too big to travel on this road. A solution to this problem could be the foundation of a consortium that offers tourists travel services from and to Salerno or Sorrento. These are two opposite cities located at the left and right side of the Amalfi Coast and they should play the role of public transport hubs<sup>2</sup>. Secondly, there is a lack of organization because there is not a local or provincial authority that really coordinates common tourist policies. Finally there is also a lack of cooperation, a typical aspect also of the Italian SMEs, due to the different interests of hoteliers, local authorities and trade associations.

To have a better view of what this destination is, it is necessary a quantitative analysis about the tourist arrivals in 2012 (see figure 2). These data are collected and elaborated by the Provincial Tourism Board of Salerno (Ente Provinciale del Turismo EPT).

From analysing data regarding the tourism demand in 2012, it emerges that 298.743 tourists arrived and visited the Amalfi Coast. This amount comprises the arrivals in the whole accommodation sector, not only in hotels but also in Bed and Breakfast and agriturismo facilities. In this destination therefore it is possible to conclude that tourism is seasonal because the 90.21% of tourism demand is concentrated between April and October.

Finally, in order to have a clearer overview of tourism in the Amalfi Coast, it is important to specify the targets of this market. The tourism supply is above all focused on leisure, instead the business tourism has a residual part in this market.



Fig. 2 Arrivals in the Amalfi Coast.  
Data source: Tourism Provincial Board of Salerno (EPT).

<sup>2</sup> A public transport hub is a place where passengers are exchanged between transport modes (e.g. train, bus, tram, underground or ferry).



Analysing the leisure side, the Amalfi Coast attracts mainly beach, cultural and rural tourists; above all the first target generates a negative phenomenon well-known in the tourism literature as mass movements of people.

### *2.1 The impacts of tourism*

In tourism literature, the impacts on a destination is given a lot of consideration and it is a current theme of discussion among many authors. There are three categories of impacts: economic, environmental and socio-cultural; all of these are interrelated and they influence each other. It is also true that the impacts are generally caused by development or by visitors themselves (Pedersen 2002). Development impacts are related to the infrastructure, this is not the case of the Amalfi Coast, since it is in World Heritage List of UNESCO therefore there are a lot of landscape restrictions and at the moment I cannot image an alternative infrastructure to SR 163. Actually the main impact is caused by visitor volume during certain months of the years. In order to support this I have to refer to figure 2, in which it is possible to see that from June to September tourist demand is very high in relation to the size of this destination and during these months there are a lot of problems related to traffic congestion.

Based on this assumption in this report I will not analyse what might be done in this destination to manage the impacts of increasing numbers of tourist, but I will discuss how to manage the current impacts considering the current numbers of visitors. In the end I will refer to the increasing numbers of tourists during the winter time as a solution to the seasonality.

The negative environmental impact that affects the tourism sector in the Amalfi Coast is the traffic congestion as I said before, this is an aspect of the seasonality of tourism demand. The World Tourism Organization (UNWTO 2004) explains that this phenomenon occurs when too many people or vehicles, or both, are present in the same place at the same time. In the destination this impact causes several consequences that are related to environment, economic and socio-cultural aspects. The environmental consequences are: the increasing of pollution which is bad for hosts, visitors, flora and fauna; the increasing of litter; the damage of private and public buildings due to road accidents. The economic effects are related to the decrease of efficiency of tourism service (e.g. delays on public transport); the increasing of the time to reach places and con-



sequently people spend more time and money for fuel. This increasing of time causes also socio-cultural consequences such as stress on the local community (e.g. difficulty for hosts to park their vehicles). Moreover, all these effects “can reduce the time available for participation in tourism activities and could be perceived as an unsatisfactory experience by visitors, having a negative effect on a possible future visit or even lead visitors to seek out alternative destinations” (Saenz-de-Miera and Rosselló 2012, p. 466).

Based on the WTO's studies, Nijkamp and Riganti (2008) point out the main indicators of congestion in cultural sites such as: the ratio of local population to tourists during peak and off-peak seasons, the number of tourists who believe that the destination is too crowded using an exit questionnaire or the number of tourists per square meter. These tools are not used at the moment in the Amalfi Coast but future implementation should not be expensive.

### *2.2 Strategy to face the seasonality*

After having analysed that an increase of number of tourists could not be feasible during the high season, not because the number of visitors has already reached the carrying capacity of the destination, but because the weaknesses of the Amalfi Coast are more relevant than its strengths. According to some researches an increase in visitor numbers led to a decrease in satisfaction. This negative effect occurs when tourists feel that fellow visitors are interfering with their expectations (Pedersen 2002). This could happen also to those tourists who want to visit the Amalfi Coast from June to August.

In order to maximise the benefits and minimize the cost of tourist activities we should go back to the strategies to face the seasonality analysed in the first part of this report. I said that there are four categories in which these strategies can be classified. In this section I will give some examples (those that I think to be the most suitable respect to this destination) for each strategy category to face the seasonality as well as its collateral aspect: the congestion.

Considering the first category, *differential pricing*, a possible strategy pointed out by different authors, such as Common & Page (2001) or Witt & Moutinho (1995), is the seasonal or promotion pricing in order to increase visits in low periods, increasing yield, and at the same time setting high prices in peak season to decrease congestion. This strategy is related



to some techniques of revenue management. A way to apply this strategy is to offer attractive packages to encourage off-season tourism with the aim to use the operational resources for longer periods throughout the year (UNWTO 2004). Nowadays in the Amalfi Coast the tourist entrepreneurs adopt individually another method that is the closure of business in off-peak season to reduce the operational costs. In my opinion, this technique is not acceptable in a long-term view if we start to think in a systemic approach.

The second category named "*diversified attraction*" includes strategies that have the purpose to change the product mix of the destination. Considering that one weakness is related to the lack of infrastructure, the priority should be given to facility or structural development. As example this destination needs a convention hall or another kind of building where it is possible to plan indoor activities during the winter months that coincide to the low season, this investment should lead to an increase of visits in low periods and at same time attract the business segment.

Analysing the third category, *market diversification*, a successful strategy for the Amalfi Coast could be the implementation of marketing campaigns to attract different segments in different seasons, this strategy is also called by Witt & Moutinho "*multi-segment approach*" (Lee et al. 2008). Many destinations tend to attract specific niches of market and focus on reliable segments that should represent the key drivers for the future. In the tourism literature there are several examples about the re-positioning of a destination, for example a coastal place can diversify its product and attract special interest groups (UNWTO 2009). This diversification can contribute to the competitiveness of coastal destinations, above all when tourists have the opportunity to enjoy cultural and natural sites on the coast (Centre for Industrial Studies-CSIL 2008). Considering this strategy the key drivers for the future of tourism in the Amalfi Coast are culture and ecotourism (e.g. trekking); this is underlined also by Piscitelli "*Excursions and cultural tourism have the first advantage to prolong the tourist season beyond Summer*" (2011, p. 47). This author's statement appeals to the natural resources (e.g. the paths that offer beautiful landscapes) and also to some cultural aspects because Amalfi was the first maritime Republic.

Finally, looking at the last category, *facilitation by state*, I strongly support the development of local business networks



and partnerships because this strategy is linked with a model that I am going to analyse in the conclusion. In this case the recommended actions refer to the creation of partnerships and other forms of cooperation within the destination and also outside with the nearest places. Inside the destination, knowing the issues of Amalfi Coast, it is possible to “persuade local tourism service providers to remain open and provide an appropriate level of services in low season periods” (UNWTO 2004, p. 63). On the other hand referring to the partnerships outside the destination, it is desirable to arrange some joint promotional campaigns with complementary places in order to distribute the flow of travellers in peak periods (ibid).

### 2.3 Conclusions and suggestions for the future

Before analysing the Amalfi Coast through the model named “Cultural Heritage Territorial System” (CHTS), I would summarize all the aspects discussed up to now using an exemplification of the SWOT analysis model originated by Albert Humphrey in 1960’s (see table 2).

The only aspect that I have not written about is related to threats; the main one is the competition of the nearest destinations that quite often have lower prices than Amalfi Coast. For a deeper analysis it is possible to consider other threats

regarding the economic condition, such as a recession period or other macro aspects.

In the previous paragraph, I explained that nowadays the tourism entrepreneurs passively adapt themselves to the seasonality of demand closing their accommodations during the off season periods (most of them are closed from November to the end of March). This way of running their business is due to a lack of cooperation, this is caused by conflicting interests that do not allow the application

**Table 2: An exemplified SWOT analysis of the Amalfi Coast.**

<p><b>STRENGTHS</b></p> <p>Natural resources</p> <p>Cultural resources</p> <p>Location</p> <p>Landscape</p> <p>Multi-type destination</p>	<p><b>WEAKNESSES</b></p> <p>Lack of infrastructure</p> <p>Lack of organisation</p> <p>Lack of cooperation</p> <p>Seasonality of demand</p>
<p><b>OPPORTUNITIES</b></p> <p>Encourage off season tourism</p> <p>Investments in facility and structural development</p> <p>Attract different markets and stimulate the cultural and ecotourism demand</p> <p>Adopt a Viable Systems approach (VSA)</p>	<p><b>THREATS</b></p> <p>Price competition of the nearest destinations (e.g. the Cilentan Coast)</p>



of any bottom-up strategy. The lack of cooperation is related to the lack of organisation because there is not an authority that really coordinates common touristic policies. To solve this problems is desirable a top-down solution where the provincial or the regional authority sets some actions to facilitate some partnerships or other forms of cooperation.

### 2.3.1 The Cultural Heritage Territorial System

I have chosen to adapt this model to the tourism system of Amalfi Coast because it allows for all the aspects to be analysed. The CHTS model (see figure 3) is a good synthesis of two other well-known fields of studies in the management literature: the Viable Systems Approach, or VSA (Golinelli) and the Service-Dominant Logic, or S-D Logic (Lusch and Vargo).

On the left side of this model there is the *triple subjectivity of Governance* that contains the VSA's assumptions. These three various institutional territory levels are represented by:

- “the *Regulatory Authority*, the decision maker who defines pillars of action for the territory (e.g. the Ministry of Cultural Heritage and Environmental Conservation);
- one or more *Coordinators*, capable of developing proposals for each line of action identified by the decision maker (e.g. Unesco National Commissions);
- one or more *Proposers*, public or private, engaged in the realization of the projects proposed by the Coordinators” (Barile et al. 2011, p. 20).

On the right there is the operative structure, as well as in VSA, but it contains two concepts of S-D Logic, such as operand and operant resources. The operand resources have physical

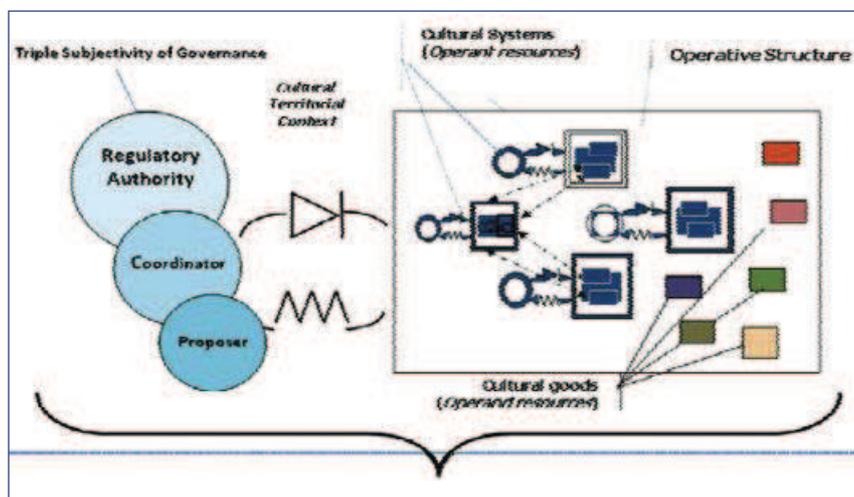


Fig. 3 CHTS model.  
Source: Barile et al. 2011.



and static characteristics and on those it is possible to practice an action with the aim to produce an effect. Instead the operand resources can be compared to the core competences, hence they are dynamic and intangible. These resources are the tool to act on the first ones (Lusch and Vargo 2004). In the

CHTS model the operand resources are represented by cultural goods, while the decision makers and operators represent the operant resources because their resources are able to act dynamically on the cultural heritage (Barile et al. 2011). To have a clear idea of how this model can be adapted to the Amalfi Coast, see the figure 4.

The operand resources in Amalfi Coast are represented by the natural and cultural heritage resources analysed as strengths of the destination, but this section includes also the lack of infrastructure. Instead the core resources of S-D Logic, the operant ones, are represented by the hospitality accommodations and tourist operators

present in the destinations. The lack of organisation represents a negative aspect of the operant resources because there is not an authority that coordinates the different stakeholders' interests. Finally analysing the governance of the Amalfi Coast tourist system it is evident a lack at the coordination authority level responsible to coordinate, control and improve the territorial resources following the Regulatory Authority's guidelines. The coordinator role has to facilitate the cooperation within the destination among the stakeholders operating there. The concept of cooperation, or engagement, is actual in the marketing literature and it is also a pillar in Buhalis's studies. In a recent seminar held in Andorra, he has underlined the importance of engagement inside the destination in order to "maximise the wealth creation... and create the best value to every stakeholders" (Buhalis 2013). A form of cooperation is creating partnerships between public and private sectors, and above all among all local suppliers of the destination, only acting in

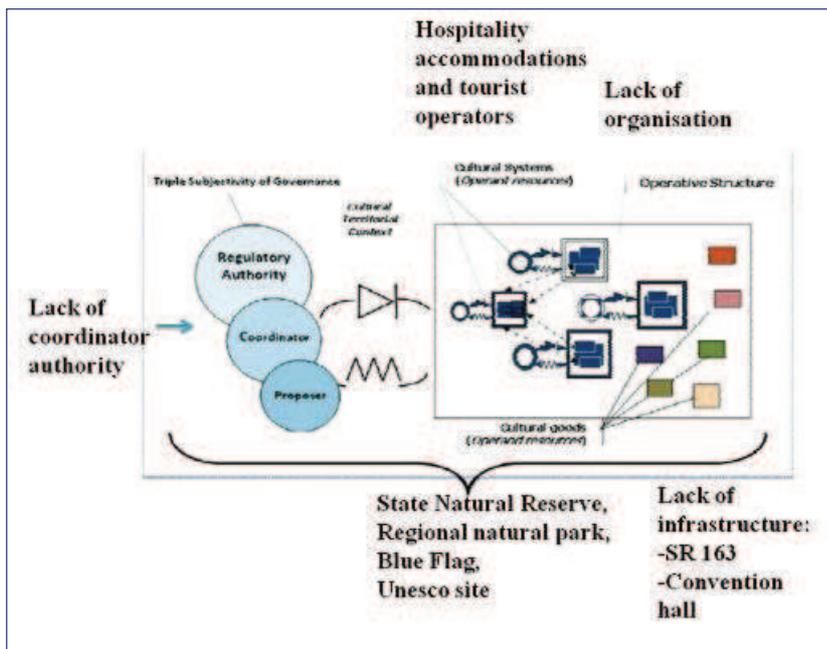


Fig. 4 CHST model applied to Amalfi Coast. Source: adapted from Barile et al. 2011.



this way they can offer a quality product. For this reason local suppliers should cooperate instead of compete each other within the destination (Buhalis 2000).

I believe that applying the CHTS model and the strategies mentioned before the Amalfi Coast should easily face the challenge of seasonality of demand. A system approach and the related concept of cooperation can help the Amalfi Coast to “deseasonalise” its demand, focusing more its supply towards cultural tourism and ecotourism in such a way that tourist phenomenon involves not only peak seasons but also winter period. A consequence of this hypothesis will be the increase of the number of tourists with the related maximisation of the benefits and the minimisation of the costs of tourism activities within the destination. The maximisation of benefits might come from the possible income generated by cultural tourists and ecotourism activities, such as trekking, during all year because with the cooperation of all stakeholders these activities may be carried out in any season. This will have a positive consequence on the labour market whereas actually it is related to the seasonality of tourism demand. The minimisation of the costs, or negative impacts, should derive from the shift of tourist flows in different periods of the year and from the creation of the mentioned transport consortium in order to reduce the congestion on the SR 163 and the other related economic and social impacts.



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