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# Sustainability of Rural Tourism and Promotion of Local Development

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Edited by  
Antonietta Ivona

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# **Sustainability of Rural Tourism and Promotion of Local Development**



# Sustainability of Rural Tourism and Promotion of Local Development

Editor

**Antonietta Ivona**

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## About the Editor

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# Preface to “Sustainability of Rural Tourism and Promotion of Local Development”

Rural tourism has been considered as a chance to promote local development, thus representing an economic activity that involves a change in rural areas. One of the priorities of rural tourism development is its sustainability. The purpose of this Special Issue is to investigate the possible combination of sustainability and the economic and social development of activities related to rural tourism through extant literature reviews and case studies. Our published articles include empirical, analytical, or design-oriented approaches to the following topics:

- Monitoring of carrying capacity and mechanisms for managing tourist flows in rural areas;
- Systems and tools to measure the social, economic, and environmental sustainability of rural tourism;
- Integration between public tourism policies and private strategies in the promotion and implementation of sustainable practices;
- Policies for promoting public participation in the planning and development of sustainable rural tourism;
- The impacts of tourism on traditional agricultural activities;
- Identity enhancement of the territory and its productions;
- “Good practices” in the implementation of rural tourism sustainability.

We sincerely thank all authors contributed to this Special Issue, who had provided valuable opinions and interesting insights.

**Antonietta Ivona**

*Editor*



Editorial

# Sustainability of Rural Tourism and Promotion of Local Development

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## 1. Introduction

Since the 1970s but with greater intensity in the 1980s, strong, social, economic, and cultural transformations have led to the post-Fordist or post-productivist countryside determining what researchers identify as “rural restructuring”. Evolving from a vision of the rural area as an undifferentiated space for the vast production of food, people now consider it a space with different functions—naturalization, residency, landscape and environment, and historical and cultural memory—that complement or even replace production as well as a space with many economic, social, and ecological dynamics; these functions differ from one territory to another [1].

In recent years, the rural world has undergone new changes. Nature conservation and local culture have become increasingly important. Historic buildings and traditional rural societies have received more attention. Some rural regions that are more accessible than others have been repopulated with the arrival of those who have left the city (counter-urbanization). However, for many rural areas, the declining trend remains. The contemporary literature suggests two concepts to describe the current processes: multifunctionality and diversification, both relating to the individual farm and to the territorial system examined [2,3].

The first concept of multifunctionality refers to the various functions performed by the agricultural sector that are placed side by side against the “traditional” with the production of goods made for the market (mainly food but also fibers, timber, and other products). Until twenty years ago, public intervention in support of the agricultural sector was responsible for the maintenance of employment and the regulation of migration flows from rural to urban areas; currently, privileged aspects of environmental care and overall quality of life are attributable to the following categories: revitalization and socioeconomic development of rural areas, food variety understood as the availability of a plurality of different products to limit the increasing standardization of food imposed by the industrialization and globalization of models of production and consumption, and maintenance and reproduction of the physical and anthropic environment. These new features, however, cannot be separated from traditional farming, but they derive from the complex relationships between agricultural production, nature, and the human environment in which the production takes place.

The second abovementioned concept is diversification related to the coexistence of traditional agricultural activity together with industrial, handicraft, tourist and recreational, nature protection, and residential activities. Diversification plays an important role in formulating the policies of agricultural and rural areas in consideration of the opportunities for income and employment (and its induced effects) that may result and that may partly offset the reduction in income derived from the exercise of traditional agricultural activities. Diversification can also represent a mode of remuneration of some of the production processes, and thus, multifunctionalities can contribute to their reproduction and maintenance over time.

The growing complexification of rural tourism is reflected in its possible definitions according to accommodation, location, activities, interest, or motivations. It is considered



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opposite to urban tourism, referring to a certain form of tourism realized in a different, unusual place. Taking into account all of the different considerations and research, it is not easy to give a unique global definition. Generally, rural tourism activity is endowed with some uniqueness, as it takes place in rural areas and the main motivation is the pursuit of tourist attractions associated with relaxation, the countryside, traditional culture, and escape from the maddening crowd. A further definition considers rural tourism as “that tourist activity in rural areas, structured by an integrated offer of leisure, and directed to a reasoned request through contact with the native environment and with a relationship with local society” [4].

## 2. Rural Tourism

Rural communities see the development of tourism as an opportunity to diversify the economy of rural areas and to revitalize territories that are otherwise no longer competitive in the face of market dynamics and the evolution of agricultural policies. The interest in tourism as a factor in the development of rural areas lies in numerous elements, real or presumed, such as the need for high work and easily acquired preparation, that are therefore able to guarantee high involvement of the local population, especially in females and female groups, youth, the possibility for local actors to start new activities with even limited private investments but also to attract investment flows from outside, and the activation of a demand capable of creating induced and therefore extended activation effects on a multiplicity of economic local activities [5–7]. In the framework outlined, the territory assumes multiple economic and social values. In this way, it becomes a stage and actor, at the same time, of those economic activities that propel a new development that is much more aware and lasting than in the past.

Rural tourism has been considered, therefore, as a chance to promote local development, thus representing an economic activity that involves a change in rural areas. Consequently, marketing activities begin to play a very important role, and selling rural tourism means selling activities in a rural space (for instance, walking, climbing, hunting, adventure, sport and health tourism, educational travel, arts, and heritage), thus showing its main facets. This is an economic activity with potential social, economic, and environmental impacts that are highly dependent on the local characteristics of a region, and it has the potential to stimulate rural economies with positive effects on farm income. However, the extent of the financial benefits and economic impact is still contested due to conservative estimates.

One of the priorities of rural tourism development is, thus, its sustainability; according to the World Tourism Organization: “Sustainable rural tourism is to find the correct harmony in the relationship established between the needs of the visitor, the place and the receiving community”. Therefore, the main functions of rural tourism are the following: completing agriculture, recovering the traditional architectural heritage, managing natural and cultural resources, and promoting the integration of the local population into tourism to improve their quality of life [8–10]. Furthermore, rural tourism should generate additional revenue, contribute to the economic revitalization of depressed areas, promote the maintenance of agriculture, and incorporate women in paid work.

Besides the complexity of rural tourism definitions, rural tourism is perceived differently in different countries. For example, rural tourism products are often based on bed and breakfast, with accommodation in traditionally furnished rooms and traditional breakfasts often based on home-made products as in Greece, for example. In Finland, rural tourists usually rent out cottages. In the Netherlands, rural tourism products mean camping on a farm and route-bound activities such as walking, cycling, or horseback riding. In Hungary, rural tourism has a special term: village tourism, which refers to tourism in villages, presenting life in the country plus traditions with the active participation of visitors [11].

### 3. The Many Ways for Local Tourism Development

A systematic review of the scientific literature of the sector can be very useful for understanding the many facets of the delicate balance between economic development and rural tourism; the different perspectives on the basis of which the scientific literature deals with the theme of rural tourism indicate the possible tools to support the sustainable development of rural areas. The current trends show how rural tourism represents a growing market that offers rural communities an interesting opportunity for growth. More and more tourists pay attention to the values of culture, food, and landscape. Furthermore, it can make a valuable contribution to the sustainable development of rural areas. To this end, the organization of agricultural businesses also evolves towards alternative network models that guarantee greater economic and social benefits and a renewed active role in the agri-food system.

These models are characterized by a reconnection between producers and consumers with these explicit ethical and political objectives: revitalization of the identity of the territory and the relations of the rural community with food and local agriculture, the link with agricultural sustainability, and economically sustainable and socially responsible practices.

The new demand for rurality, therefore, raises new questions: it is no longer a question of perpetrating a traditional agricultural model based solely on productivity and profit maximization but rather an agriculture strongly oriented towards multifunctionality that also involves peri-urban areas. An example could be agricultural parks, innovative and multifunctional, where agriculture is practiced with environmental, landscape, and social functions; they could represent, in the near future, a strategic resource for the tourist enhancement of peri-urban areas. In this perspective, two Italian case studies, the Ciaculli Agricultural Park (Sicily) and the Agricultural Park Sud Milano (Lombardy), are examples of how agricultural parks can play the role of drivers for tourism development. The first is the last extensive agricultural area in the municipality of Palermo. The park was created starting from the elements of the historically formed agricultural system, highlighting their role in defining the specific overall relationships and their degree of persistence, and planning interventions for the conservation, recovery, restoration, or replacement based on their intrinsic value of architectural and environmental assets. The entire area was affected by interventions to safeguard the traditional functions of peri-urban agricultural activity, in particular, the productive function since the best protection of territory is achieved by assigning or maintaining compatible uses. An important element in the realization of the park was the participation and sharing of the entire process with the local players because it had the merit of intervening in an area and a sector in economic crisis, giving a response that contained as many elements of revitalization as possible. The Agricultural Park Sud Milano covers about 30% of the total surface area of the Metropolitan City of Milan. The aims of the park are to protect and restore the landscape and environment of the strips linking the city and the countryside; to connect the external areas with the urban green systems; to balance the ecology of the metropolitan area; and to safeguard, qualify, and develop agro-silvicultural activities and cultural and recreational use.

In both cases mentioned, agriculture is the driving activity chosen to preserve agricultural territories, enhancing the different crops present historically. Multifunctional agriculture is carried out through the activation of various services: food production, catering, direct sales, accommodation, environmental education, environmental services, maintenance of the landscape and biodiversity, sporting activities, and organization of rural tourist itineraries.

Of particular interest in this type of relationship is the portion of land in contact with the two areas or, rather, at the border of both, where one ends and the other begins; “urban” and “rural” are not entities that exist independently of human practice and special interests: rather, the nature and character of these categories depend on how they are defined. Therefore, it is important to reflect on the type of relationship between the two

areas or, rather, on the border of both, where one ends and the other begins, to define the best possible interaction.

While recognizing the limits of peri-urban agriculture such as greater demographic pressure in these contexts and greater competition on the use of natural resources, however, this type of agriculture can count on other positive aspects such as proximity to local markets and economic and social dynamism compared with traditional rural areas.

The tools for tourism development in rural areas are varied and very heterogeneous. As in the case of regional parks where the social dimension plays an essential role also for the revitalization of rural villages, this role is fundamental. Territorial identity can constitute the theoretical foundation to influence development policies and, in particular, tourism development for the sustainability process. This strong depopulation has caused a loss of skilled labor and businesses, causing both economic and socio-environmental degradation. As the geographic literature shows, there are three possible remedies historically followed: The first is the so-called “conservative” approach, which suggested maintaining a minimum level of services for the population to discourage further abandonment. The second “compensatory” approach envisaged a sort of replacement of new residents who would compensate for the abandonments. Finally, the third “multifunctional” approach is derived from the superimposition of the concepts of inland areas and rurality, both expressions of territorial marginality. However, all three approaches have not stopped the depopulation of these territories and their small villages.

The revitalization process of these territories takes a long time due to current conditions; at the same time, tourism today requires the rediscovery of values such as the conservation and authenticity of their tangible and intangible cultural heritage, achievable through different cultural and social factors (identity, traditions, memories, intangible ties, local peculiarities, and rural landscapes). Most of these municipalities have been identified in Italy and are so-called “borghi”, characterized by a maximum of 5000 inhabitants and “from a precious cultural heritage, whose conservation and enhancement are factors of great importance for the country system as they represent authenticity, uniqueness and beauty as distinctive elements of the Italian tourist offer” (Directive n. 555/216 of the Italian Ministry of Cultural Heritage and Cultural Activities and Tourism). Today, they constitute the backbone of Italy, covering a territorial surface of about 54% of its total territorial surface and, in some regions, reaching even 70–80% of the total regional surface. This expanse of surface does not correspond to the anthropic aspect since the resident population is 17% of the total Italian population, and in some regions, this average percentage still drops compared with the regional resident population.

Many of these towns are characterized by a rural landscape, and many others are located in the mountains or on the coasts. However, all of these are very different in their resources and heritage, which are rich in content, interconnected, and integrated, and, together with their strong anthropological characteristics, refer to the culture and lifestyles of the settled communities.

The territorial identity becomes substantial in the definition of the “borghi”, and the community is a fundamental part of it as it combines the historical characteristics of the territory with the innovative ones. A place to develop tourism always safeguards the territory, understood in its human, historical, architectural, natural, landscape, cultural, social, and economic meaning. Furthermore, to highlight the tourist value of the “villages”, their tourist vocation should also be considered. The recovery of the “borghi” for tourism purposes, therefore, can be undertaken only if it forms a territorial identity capable of reviving an active and dynamic community, both to activate that sense of uniqueness of places, the *genius loci*, and the narrative of cultural heritage.

An interesting example of the enhancement of the “borghi” is that of the rural area of the “Monti Dauni” in Apulia (in Southern Italy). Within these small towns, following the consolidated principles of sustainability and social cohesion, local actors aim to maximize the opportunities for sustainable and experiential tourism by offering an uncontaminated environment, ancient knowledge, genuine flavors, and deep emotions to all visitors who

wish to deepen their knowledge of the territorial identity instead of being mere spectators, adopting an active and committed attitude. Thus, the communities can become key players of a real “hot authentication” path according to the definition given by E. Cohen and S.A. Cohen [12] of their milieu, initiating a “recreational re-ruralisation” [13] (p. 206) that catches the interest of travelers in search of “a break to replenish energies and regenerate” [14] (p. 20), creating “unprecedented forms of economy and socialization and building new-ancient meeting places” (Ibidem).

In the town of Mértola (Portugal), a peripheral territory with fewer opportunities and a structural crisis, historical heritage of the town, its conservation, and its value of tourism have been converted into a comparative advantage that generates opportunities for local development. However, the substantial amount of heritage increases its conservation costs and hinders the continuity of conservation projects. The social, political, and institutional contexts define the processes of heritagization and its value for tourism, which generate the dialectic between heritagization and the exploitation or the commodification of heritage as well as its overall perceptions and the conceptions of development that are significantly dependent on dominant relationships and discourses. First, the cooperation and then the competition between private and public actors indicate contradictions and conflicts. The recovery of the collaborative approach improves the results that are reflected by the increase in tourist supply and demand.

Today, the sustainability of rural tourism development appears as a multi-faceted issue; it involves not only traditionally inland areas but also coastal areas. The case of the Delta of Nemunas and Laguna dei Curi (Lithuania) is, in fact, an example: through the integration of tourist activities with those historically carried out, the local population has the opportunity (a potential supply of cultural ecosystems) to realize the diversification of economic activities to meet the needs of tourists (a potential demand for cultural ecosystems) to achieve service differentiation. Even the Luoshan Organic Agriculture village in Taiwan can be an example, focusing on organic farming and cultivation. The village was developed through community empowerment and the utilization of existing tourism resources. The integration between natural resources of the landscape and the experience of organic farming has contributed to the success of this travel destination. Here, the uniqueness of organic farming and the image of environmentally conscious tourism have merged to convey a positive image on the tourist market.

From a strategic point of view, it can certainly be said that rural and sustainable tourism development is the result of a skillful combination of several elements present in the area. The rural area of Marginimea Sibiului in Romania has managed to achieve national and international notoriety by developing consistently, capitalizing on its natural and cultural heritage and providing services in successful farms and rural guesthouses, which have continuously evolved both numerically and in terms of comfort levels.

Cultural heritage is a vital part of a society’s existence. The real challenge is between cultural conservation and economic development in general. Twenty-first century China faces this in its race for economic development. Two case studies, from Lijiang in Yunnan province and Rizhao in Shandong province, demonstrate how a successful tourism strategy generates many cultural benefits while minimizing costs for the host community.

The implementation of sustainable rural tourism through “best practices” allows for diversification of the offer and for obtaining satisfactory results; through downshifting and permaculture practices, the Brasov region, one of the most important tourist areas in Romania, has created a tourism product in balance with nature, with care for people, and with an ecological lifestyle.

According to the Countryside Commission [15], sustainability is one of the priorities of rural tourism development: “sustainable rural tourism consists in finding the correct harmony in the relationship established between the needs of the visitor, the place and the receiving community”. In addition, gender equality is explicitly listed in the 17 Sustainable Development Goals [16]; therefore, looking to the future, the desired harmony should be conceived as social and relational sustainability, meant as a formula to ensure equal gender



treatment and representation of spatial discourses that ensure visibility, as is the case of gendered cinematic representations that mainly occur in the rural space of the Camino de Santiago (Spain).

The territorial reconfiguration process that led to new uses of agricultural land also have to take into account equally new conflicts of use. Increasingly, scholars detect a conflict of use of the land between the hypothesis of persevering in exclusively agricultural activities and the possibility of introducing new activities. Often, however, agriculture is the only activity practiced by a population that is not sufficient to guarantee sufficient income; it is therefore necessary to diversify economic activities. Are sports such as golf a new form of sustainable tourism or a violation of traditional rural vocations? The answer cannot be univocal but varies according to the different territories considered. In some cases, sports do not completely replace traditional agricultural activity but performs a complementary function to it.

#### 4. Concluding Remarks

Tourism has shown that it can play a fundamental role in the development of rural areas, offering rural areas the opportunity to diversify their economy and to improve the quality of life of the local population. In this Special Issue, most papers investigated the possible combination of sustainability and the economic and social development of activities related to rural tourism through extant literature reviews and case studies. All papers show that there is not just one method of development but it is their combination that generates positive effects on the territory and on the communities that populate it. This Special Issue, therefore, tries to suggest some ways to implement the principles of sustainability in tourist and rural activities. The case studies can be considered “good practices” to inspire future economic and social development strategies for rural areas.

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## Article

# Between Urban and Rural: Is Agricultural Parks a Governance Tool for Developing Tourism in the Periurban Areas? Reflections on Two Italian Cases

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**Abstract:** The new demand for rurality raises new issues: it is no longer a question of sustaining a traditional agricultural model based exclusively on productivity and profit maximisation, but rather agriculture strongly oriented towards the production of non-commodity outputs that very often have the characteristics of externalities or public goods. Based on these assumptions, the paper intends to frame the role of multifunctional agriculture for the development of peri-urban areas looking in particular to the agricultural parks phenomenon, in which innovative and multifunctional agriculture is practiced (with environmental, landscape, and social functions), to assess if they can represent a strategic resource for the tourist enhancement of territories on the edge of urban and rural areas. With this perspective, two Italian case studies, Parco agricolo di Ciaculli (Palermo) and Parco agricolo Sud Milano (Milano), have been analyzed highlighting their main characteristics and under which conditions they can play the role of tourism development driver.

**Keywords:** periurban; multifunctional agriculture; periurban parks; tourism



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## 1. Introduction

For centuries, the city and countryside were strongly distinguishable from a spatial and functional point of view, but at the same time intimately linked by a productive relationship: the city as the place of consumption, the countryside as the place of production [1]. The process of globalisation, which began in the second half of the last century, has stimulated the growth of the urban dimension in demographic and spatial terms, extending over the surrounding territory: the demarcation between one type of settlement and another has become increasingly blurred, resulting in a plurality of territorial fragments deprived of their specific identities. The history of the last century was characterised by this trend: the loss of the border, in its material and perceptive value. The current urban sprawl has profoundly marked agricultural territory, modifying the consolidated (and by now outdated) city–countryside relationship, even according to which the city is no longer a univocal reality: the material and immaterial scenarios that it offers and proposes are countless and diverse [2]. The change in this relationship, which has affected socio-demographic, economic, spatial, and functional aspects, has also conditioned the shape of the countryside “and, with the shape, agrarian systems, their functions, the relationship between agroecosystems and environments, the structure of supply chains, but also the quantity and quality of the food itself” [3] (p. 12).

Having overcome the clear demarcation between the two entities, new definitions have appeared in the scientific literature to describe territories in-between urban and rural [4,5]—increasingly subjects of transformations that see the mutual contamination of both dimensions—and to interpret the coexistence and mixture of new settlement forms, uses, and practices. In other words, these conditions, defined as peri-urbanity, occur where

the urban and agricultural-rural dimensions are brought into contact in a relationship of strong reciprocity and exchange: within a broader territorial vision, the peri-urban is not to be considered simply as a ‘space around the city’: in it, rather, we can glimpse a new and autonomous shape of the contemporary city. Peri-urban contexts “are located close to the dense agglomeration of the urbanised continuum [...], where the city and the countryside come into direct contact [and] host most of the urban growth” [6] (p. 13).

Whatever one defines it—urban sprawl, spread city, *ville éparpillée*, diffuse city, agro-urban, rururban—the peri-urban space is one of the characteristics that most of today’s metropolitan areas have in common [4]. It is a space, which is not a city, nor even less so the countryside, in which there is a reorganisation and redistribution of part of the productive and tertiary activities of strong attractiveness, of the residential fabric, etc. It is a place for experimentation with new forms of urban development. It is also a place where new lifestyles and more innovative strategies of space and time restructuring are experimented with, according to different individual and/or family choices [7]. It is in this diffuse city, where the clear boundary between urban and rural disappears, that phenomena of environmental and landscape degradation can occur, producing landscapes of disorientation, if appropriate development and redevelopment policies do not intervene [8,9].

Therefore, we are faced with territories in which an important game is being played to contain land consumption and restore functions aimed at environmental sustainability and territorial protection. The peri-urban spaces become real attractors, reference points through which to trace and recognise in the territory “the social, cultural and economic energies that can produce new territoriality and new citizenship [...]” [10] (p. 38), in an attempt to respond to the needs of identity and of environmental and urban quality. A redevelopment is envisaged, not only of a physical-functional nature but rather directed towards the introduction of new forms of governance of land transformations that, above all, turn their attention to the active enhancement of these peri-urban areas, reinterpreted as places of aggregation and enhancement of agricultural, environmental and landscape potential [11]. Agricultural parks, urban gardens, farmers’ markets, educational farms, recreational spaces, etc. seem to respond to the new demands for re-appropriation of the territory, sharing the instances of innovation, development, and participation [12]: these experiences can be configured as those projects capable of rediscovering the values of these realities on the edges of the rural and urban.

This is the direction taken by farms that practice agriculture using innovative criteria and focusing on multi-activity and multi-functionality, for which it becomes a priority to perform landscape functions and maintain biodiversity. The traditional urban-rural dualism can be overcome by enhancing the multifunctional aspect of agriculture, provided that innovative agricultural production practices are encouraged on the one hand, and on the other, agro-urban policies are implemented that consider the integration of the urban and rural components as fundamental.

In other words, the multifunctionality of agriculture has a social and environmental role, as it is geared towards providing services to communities and safeguarding natural resources; factors that represent opportunities both for the territory and for the farmer, who can thus supplement other sources of income. In peri-urban farms, the possibility of carrying out differentiated functions ranging from the production of goods to the production of non-commodity outputs, which very often take on the characteristics of externalities or public goods (landscape, cultural heritage, food safety, territorial protection, etc.), undoubtedly constitutes added value [13]. Not only agriculture, but also activities linked to tourism, leisure, and the rediscovery of ecological and environmental values in the area, which can be fully welcomed in peri-urban agricultural parks, acting as mitigating elements of these realities.

According to the guidelines in the “European Economic and Social Committee” (EESC)’s 2005 opinion, the objectives of preserving and developing peri-urban agriculture must be achieved through programmes that can be applied at the inter-municipal and supra-municipal levels by networking public and private players in the area. This approach

is in line with what happens in a peri-urban agricultural park, the creation of which is entrusted to a ‘participation and management body’ capable of coordinating the various actions and stimulating and enhancing the creation of cooperation networks between the various players [14] (p. 61). In addition, further specific aims of the park are that “the various actors take a ‘creative’ and planning attitude and that actions are developed based on factual and contractual modes of commitment” [8] (p. 165).

## 2. Methodology and Aims

These are the characteristics that distinguish European agricultural parks, which, in peri-urban areas, offer an opportunity to enhance agriculture, but also to contribute to the dynamisation of territories.

In Italy, most of the parks classified as agricultural are set up on the basis of a bottom-up approach (the factual logic) and differ “in terms of size, type and number of players involved, as well as organisation and purpose”, while parks interpreted “as formalised territorial government institutions” are less common. Starting from these considerations, the article intends to analyze the peri-urban phenomenon both from a theoretical point of view, through its distinctive features and the model of agriculture that characterises it, and through the analysis of two case studies relating to institutionally formalised parks but characterised by different geographical scales and genesis: the Parco agricolo di Ciaculli (Ciaculli Agricultural Park) as an example on a municipal scale, and the Parco Agricolo Sud Milano (Pasm) on a regional scale. Through these analyses, the article aims to assess whether the agricultural park, meant as a governance tool, can be used not only to protect ecosystems, enhance the landscape and reduce land consumption, but also as a driver for the tourist development of peri-urban territories.

The descriptive-qualitative methodological approach aimed to investigate the specificities of the multifunctional practices implemented by the two models of agricultural parks mentioned in order to understand their functioning, organisational and productive forms. The main characteristics of the Ciaculli Park in Palermo and the South Milan Agricultural Park were discussed and argued, with the ultimate aim of adopting them as significant experiences to verify, through the analysis of their functions and objectives, whether they act as governance tools for the implementation of an integrated and sustainable form of government of the territories halfway between the urban and the rural; and to stimulate tourism development processes in these peri-urban realities. In other words, we intend to assess their effectiveness as models of integrated territorial governance, developed from activities linked to an eminently multifunctional agriculture, and of social mobilisation. This is the direction taken by many agricultural parks, which can host multifunctional farms, able to offer different activities that stimulate tourism, starting from the enhancement of agricultural traditions (farm holidays, educational farms, recreational spaces, etc.).

Also central to this analysis is the idea that the strategies and forms of agreement implemented between the various players in the parks—institutional and otherwise—are fundamental for their good governance and for creating a “protective” outlook towards the territorial and landscape heritage.

After discussing the specific characteristics of multifunctional agriculture in peri-urban territories (Section 2), the paper will explore the case of two agricultural parks (Section 3), as preferred locations for multifunctional farms and governance tools for promoting a range of activities, not least of which is peri-urban tourism (Section 4). The results will be discussed in Section 5; in Section 6 will be presented the conclusions, and finally in Section 7 the limitations of the study and the research perspective.

## 3. Multifunctional Agriculture for the Peri-Urban Areas Development

Soil consumption in Europe and worldwide is a fact. The latest “Sistema Nazionale per la protezione dell’Ambiente” (SNAPA) report [15] confirms the criticality of land consumption in peri-urban and urban areas, where there is a continuous and significant increase in

artificial surfaces. According to the data, phenomena such as the advancement of urban sprawl, the abandonment of land, and the fragmentation of natural areas are occurring.

The redemption of these territories, characterised by a significant fragility, passes through the enhancement of open spaces that creep into the built environment and that have been spared by urban sprawl. They become the focus of urban realities, which give them new functions and values, ranging from environmental regeneration to the supply of quality foodstuffs, to the creation of recreational and leisure spaces, thus generating a plurality of management alternatives depending on the function identified [11].

The potential for local transformation is therefore new, especially where there are still significant environmental conditions, agricultural potential, and unexpressed historical and cultural values. These are all potentials to be explored, which can only be stimulated by innovative transformation and enhancement projects [2]. As Roberto Gambino points out: “models are no longer needed, what is needed is patient and unprejudiced experimentation, aimed at grasping the concrete opportunities for improving current conditions within highly differentiated, complex and unpredictable processes” [16] (p. 182). Different paradigms come to support a new reading of peri-urban territories and, therefore, territorial planning that is necessarily able to “weigh” the new needs of society. As such, it must be inspired by “authentic innovation”, which can lead to the development of projects aimed at the recovery, redevelopment, and transformation of peri-urban spaces, focusing especially on the rediscovery and reuse of their peculiar rural characteristics in a multifunctional sense.

With the overcoming of the productivist model in agriculture, as is well known, the emphasis has shifted from the agricultural to the rural and this has entailed a shift “from the economy to territorial planning” [17] (p. 7). In terms of policies and territorial operations, there is a growing awareness of the central role that agriculture is called upon to play in terms of competitiveness and employment, to contribute to the definition of sustainable landscapes. Indeed, starting with the Common Agricultural Policy (CAP) review process, the way has been opened for the definition of programs and projects the main axes of which have focused on enhancing the diversification of production, quality crops, local knowledge, and traditional techniques, calling for an integrated territorial development model [18].

The reform aims have mainly concerned the improvement of the competitiveness of European agriculture, the re-orientation of production to the market, the promotion of sustainable and socially acceptable agriculture, the strengthening of rural development, the simplification of the support system, and in general have made the CAP more responsive to the commitments made in the past or to be made in the future. If this is true on the front of European rural development policies, the situation is different at the level of urban and territorial policies, where the theme of rural and agriculture is not adequately highlighted [19]. Little consideration is given to agricultural activities and the relations between them and urban spaces. This means that there is little attention paid to the particular opportunities that can be generated from the analysis and management of the reciprocal relationships between urban and rural, as well as to the “problematic nodes to be addressed, which arise from the growing interaction between agriculture and urban settlement” [19]. The moving away of the rural from the urban at the level of urban policies and, consequently, at the territorial level must trigger a reaction centered on new processes in the field of urban and peri-urban agriculture, which must bring out “the innovative potential of new relationality and proximity between forms of the urban and the rural territory” [18]. The way to proceed goes in the direction of overcoming sectoral policies, embracing multilevel governance to coordinate funds, plans, and measures, and developing integrated planning tools for rural spaces, including landscape plans.

Given this lack of public policies, the relationship between rural and urban territories must be oriented in the direction of developing peri-urban agriculture capable of soliciting a complex set of synergies ranging from agri-food systems to ecosystem services for human settlement, to the energy dimension [10].

Certainly, peri-urban agriculture knows some limits, as underlined by Regulation (EC) 1698/05, which highlights greater demographic pressure in these contexts and greater competition over the use of natural resources. Nevertheless, this type of agriculture can count on other positive aspects: its proximity to local markets and consumers; a more marked “economic and social dynamism compared to [traditional] rural areas; a high demand for food and recreational services; a supply of services, production factors, technology and knowledge” [17] (p. 12).

The proximity in particular to local markets, where goods and services can be exchanged, is a distinctive feature of the peri-urban agricultural sector and can be a guarantee for the functioning of the enterprise and the agricultural sector. The difficulties faced by agricultural producers are represented by supply chain relations; while shortening the steps between producer and consumer allows “recovering profit margins on the part of the farm” [3] (p. 38).

As regards the goods produced, “opportunities for direct marketing and reduction of transaction costs, taking advantage of better connections with infrastructure networks and logistic services and better capacity and opportunities for coordination with the agri-food industry in general, can arise” [17] (p. 12). As regards the services produced, peri-urban farms also benefit from the direct link with consumers-citizens, who can, in turn, be involved in the direct cultivation of agricultural products for them and other types of activity (leisure, teaching, catering, tourist hospitality, etc.). In other words, agricultural enterprises can benefit from being located in peri-urban territories as territorial contexts with a high intensity of exchange of goods and services [17].

Other elements allow the identification of the agricultural sector, its functions, and characteristics in peri-urban territories. The types of farm (size, activities carried out, relationship with the market or not) operating in these contexts can be the measure for understanding the peculiarities of agriculture itself and those of the places where it is carried out. They range from ‘traditional’ to ‘adaptive’ and so-called ‘reactive’ enterprises. Their change depends on the different use of production factors: land, labor, and capital. While “traditional” farms continue to produce in the agricultural sector proper, despite their insertion in urban and metropolitan areas, and to maintain unchanged their structure, their relationship with the market and not to diversify their activities, “adaptive” farms adapt their production processes to urbanisation, investing in quality production (as required by the urban market) and decommissioning part of their production to relocate it to non-agricultural activities. Finally, farms defined as “reactive” relocate “the factors of production towards activities within the company but more or less distant from agricultural activity, activating processes of diversification and enhancement of the multifunctionality of agriculture” [20]. The responsiveness of such enterprises depends on their ability to seize the potential expressed by the peri-urban area, thanks to the production process reorganisation and by soliciting “diversification processes that can be closely linked to agricultural production (such as transformation activities) or only partially (e.g. agritourism)” [20].

Thus, the peri-urban farm can rely on the diversification of activities taking place inside and outside the farm (reactive farm). The (part-time) farmer and his family members can also carry out activities outside the farm (multi-activity), thus contributing to additional sources of income (adaptive farm).

Similarly, multifunctionality can be characterised by different levels of implementation. They range from the simplest form of multifunctionality—what Henke and Salvioni [21] (p. 3), following Wilson [22], call “weak”—which relies on agricultural practices for enhancement but does not imply a reorganisation of the production factors on the farm, to the most complex forms of broadening and regrouping. Broadening activities result in an extension of the functions performed by the farm that are not agricultural in *stricto sensu*; regrouping consists of a “reallocation” of the factors of production on a farm, which can have effects on costs and labor utilisation [21,23]. Similarly, diversification, which can only be carried out as a result of a business strategy aimed at activating, modifying, or relocating certain factors of production, may concern five choices made by the entrepreneur: “(i) the



choice to participate in non-agricultural activities, (ii) the level of non-agricultural activity, (iii) the choice of sector, (iv) the location (on-farm or off-farm), (v) the type of work" [20].

Another important aspect regards the level of technological innovations implemented by the farms. In order to survive and not give up producing positive externalities and commodities these must innovate their processes, certainly focusing on the accumulation of local knowledge, but integrated by complex and particularly innovative management techniques.

The set of characteristics attributed to peri-urban agriculture and the companies that support it—production of goods and services, maintenance of open spaces, territorial protection, limitation of land consumption, multi-activity, part-time work, short supply chain, proximity to markets—corresponds to the peculiarities expressed by the paradigm of multifunctionality of the agricultural sector.

Multifunctional agriculture is that economic sector which, in addition to the production of goods and food, can shape the landscape, to "provide environmental benefits such as land conservation, the sustainable management of renewable natural resources and the preservation of biodiversity, and contribute to the socio-economic viability of many rural areas" [24] (p. 9). An agriculture, therefore, which "expresses the capacity of the primary sector to produce secondary goods and services of various kinds, jointly and, to a certain extent, inevitably, with the production of products for human and animal consumption" [24,25].

Secondary goods and services resulting from a multifunctional activity of the primary sector are identified in four areas [26]: environment, food security, rural development, animal welfare [27]. In this perspective, multifunctionality pushes on the agricultural sector to provide social and economic well-being to the community.

Multifunctionality and diversification of activities appear, therefore, the most convincing answer for the preservation and enhancement of peri-urban territories, as territorial areas in which coexist urban, rural, and semi-natural landscapes that can attract resources and agricultural functions and express a high landscape and environmental potential. Tourism and leisure activities, water supply, hydraulic safety, waste treatment, etc., are strategic functions that redesign an innovative and multifunctional role for peri-urban spaces [28]. In these spaces the farm adopts agriculture that can be traced back to the concept of neo-rurality and aims to reach not only productive but also social goals in order to comply with the objectives of environmental and landscape sustainability. The combination of the family business and innovative production processes becomes a strong point to develop peri-urban agriculture that is innovative and resilient to the urbanisation impacts. These same processes also involve consumers and the urban and peri-urban areas themselves and the relationships between them. The innovation that agricultural enterprises carry out in "edge" areas concerns several factors: diversification processes and differentiation strategies (such as, for example, the shortening of the supply chain), as well as the relational dynamics (economic, social, political) that are determined [3]. Therefore, through the implementation of this new reading key the strong point of which is overcoming the dichotomous city–country perspective, peri-urban spaces regain a new configuration, recovering the foundational value of places and embracing a model of multifunctional agriculture, dynamic and innovative, to be understood as a strategic resource for the enhancement of marginal territories and the improvement of quality of life. In this sense, the re-territorialisation, resulting from the innovative process involving business, market, consumers, and producers, leads to the creation of "new" territories, "new" landscapes, in which agriculture, thus structured, represents the drive for innovation and the recovery of a more stringent relationship between the urban and the rural, not only from the economic but also spatial and social points of view [3].

#### 4. Agricultural Parks: A Governance Tool to Support Peri-Urban Areas

A large proportion of peri-urban areas are the result of development resulting from independent initiatives for which no joint overall vision or coherent planning has been

established. Of course, there are different models of urbanisation of the urban periphery, where the greater or lesser integration of different spatial scales is an important differentiating element. However, some negative consequences are frequent and typical, such as the consumption of agricultural land, traffic congestion, problems of social integration, landscape fragmentation, loss of habitats and biodiversity, and, in general, the loss of ecological capacity and the increase of the ecological footprint. In summary, ecosystem services and landscape character in peri-urban areas have been affected by urban growth, with differential effects on the quality of life of the population depending on how this expansion has developed, but they have also become strong attractors for both tourists and residents, transforming these areas into a real ‘release valve’ for the population living within cities.

Responding to this growing demand, many peri-urban areas have been transformed into peri-urban parks, i.e., areas of ecological, landscape, or cultural interest located close to urban settlements and intrinsically interconnected with the urban environment, capable of combining environmental protection, recreational, educational, economic and developmental functions, with the support of public policies, plans and actions, and with the full participation of the local population [29].

Peri-urban parks are, therefore, a key element of the green infrastructure system associated with urban areas and play a fundamental role in providing ecosystem services, as well as contributing to combating the depopulation of peri-urban spaces.

These parks have characteristics and roles that distinguish them from other natural or green areas, such as their proximity to the urbanised area, the social functions they perform, linked to the expansion of cities, and their level of biodiversity (ecological values and legal protection status). Depending on their more or less “urban” and socio-economically oriented character, recent research funded through the European Interreg IVC program (Periurban Parks—Improving Environmental Conditions in Suburban Areas) has identified some conceptual park types (Figure 1), that often coexist in the same park [30]:

- Protected natural park: composed of areas of high natural, landscape, or cultural value. Characterised by high biodiversity. The prohibition of certain uses can have a significant impact on development processes.
- Semi-natural agro-ecological park: a mixture of natural areas (ecological areas, such as green corridors) and artificial areas (agricultural land, forests, or wetlands).
- Metropolitan park (Green City Park): green area located near or within the urban area, with functions related to local use and directed to residents.
- Re-naturalised park: a previously degraded landscape that has been partially or completely restored.

The added value of peri-urban parks lies in their ability to respond to a multitude of issues that represent the main challenges our territories are facing today through the provision of multifunctional environmental, territorial, and social services: environmental protection and the provision of ecosystem services, the creation of green infrastructure, local economic development, improving the quality of life and promoting social inclusion. It is above all the category of agricultural (or agro-ecological) parks that respond to the need for multifunctionality, as places in which to experiment with new productive relations and use of peri-urban territories, restoring centrality not only to the rural world but also to open spaces [10].

Peri-urban parks, especially those defined as ‘semi-natural agro-ecological, are an appropriate active policy tool for implementing a reconciliation between town and country and, therefore, a perfect container for multifunctional agriculture and tourism. The opportunities offered by proximity to consumer markets, growing consumer awareness of issues such as quality (organic farming), food safety, traceability, and social demand for new activities (leisure, training, environmental education, agritourism, etc.) make peri-urban agriculture an important tool for tourism development. These areas also play a key role in land-use planning, as they prevent the unlimited growth of cities, generate landscapes,

and humanise urban environments. Moreover, they act as a green lung for large cities, increasing the level of biological diversity.

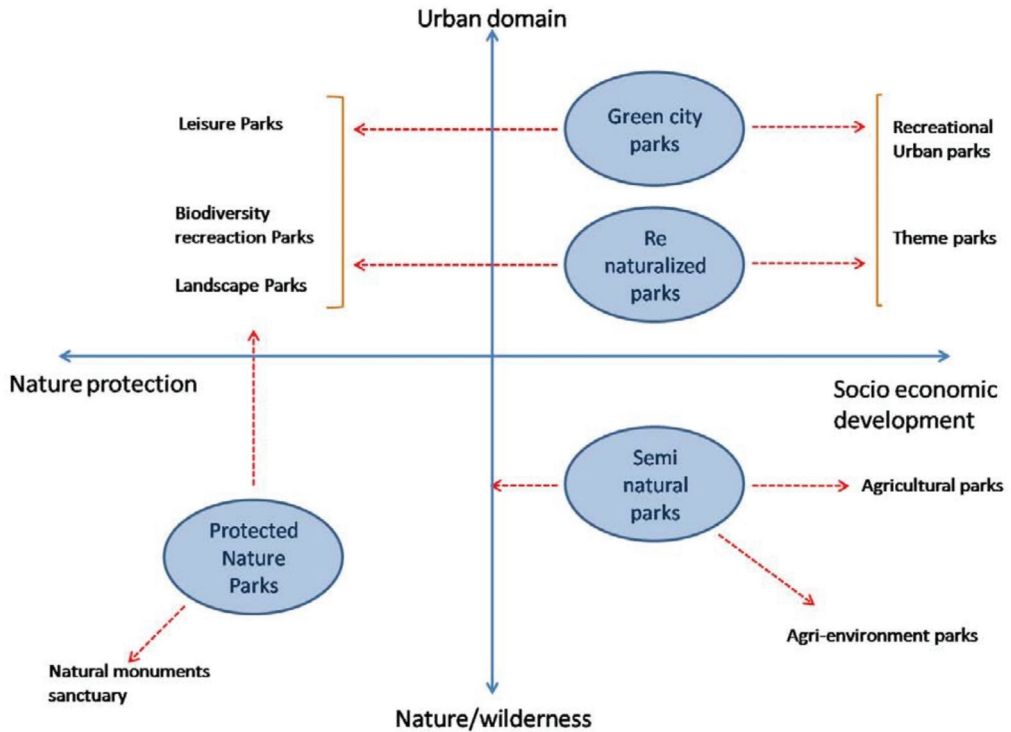


Figure 1. Concept map of peri-urban park types. Source: [30] p. 13.

However, there are potential problems. There is a risk of turning a peri-urban area designated for tourism into a ‘theme park’ if the real protagonists, the farmers, disappear. This is why there is an ever-increasing need to flank traditional agriculture with other activities, still linked to cultivation, but whose aims are purely recreational, social, therapeutic, educational, or landscaping.

In this sense, peri-urban parks must be conceived in a broad territorial context to which they provide their services and of which they are structurally and environmentally part. Only in this way will it be possible to articulate the spatial, economic, social, environmental, or governance strategies that the management of these spaces requires.

Concerning this last point, the INTERREG IVC Periurban Parks project uses a questionnaire survey of 63 parks across Europe to highlight four main management models. In order of importance, the most common model is direct management by a local authority (38%). The other three models have very similar percentages: direct management by a regional administration (17.5%); management delegated to a specific public body (16%); and management by a consortium of different administrations (16%). The remaining percentage is divided between mixed public/private management systems (4.8%) or supra-municipal organisations (7.9%) (<http://www.periurbanparks.eu/live/index.php?a=open&id=4c99fc98837e2&ids=4c8ff07964a15&l=en> (accessed on 11 December 2020)).

Against this backdrop, the authors of the project emphasise that peri-urban parks, being the urban–rural interface, are areas that require strong coordination to allow the integration of different functions and thematic areas. To this end, the most appropriate management unit, like the planning unit, must be an independent structure that is respon-

sible not only for day-to-day administration but also for more structural issues such as coordination and implementation of long-term planning. This is the only way to guarantee the interaction between policies, plans, and projects in their creation, management, and maintenance phases. An independent structure also facilitates the integration of the park into local development strategies. A second key element for the success of the park should be inter-institutional agreements. The versatility of these spaces requires a relationship between different administrative levels, with the specific participation of local corporations and civil associations.

The establishment of peri-urban parks must include the drawing up of a strategy document (a medium to long-term “vision”), which contains an idea-guide to direct change, working on the identification and creation of a driving “cognitive chain” to prevent intervention in the identified project areas from being a sum of fragmented projects. The central elements of this document are the identification of innovative subjects (which determine the choice of the chain itself) and competence centers in the area (or external), and the indication of the paths of change and the relative ways to pursue them, through the explanation of a series of actions and interventions.

Only the explanation of the expected results, and the criteria for their measurability, consistent with the objectives of the strategy, associated with their appropriation by the community, built through intense fieldwork and an open comparison with the territory and with the relevant actors of the partnership, will generate the social pressure necessary to provoke the change.

##### **5. Peri-Urban Agricultural Parks towards the Touristic Use Dimension**

As highlighted in the previous paragraph, the agricultural park represents a particular type of peri-urban park, whose structure is made up of those elements incorporated over time by agricultural activity (pathways, irrigation system, vegetation elements, architectural structures, etc.). The configuration of the agricultural park is mainly made up of the layout of the fields, the crops, the terraces, the fences, the existing inter-podal paths and new pedestrian and cycle paths, which allow accessibility and use, the water system, wells and irrigation channels, and the rural architecture (cottages and farmhouses).

An agricultural park is based on the revitalisation of an economic activity conducted in environmentally aware terms and, in fact, constitutes an innovation in the idea of the park, no longer seen as a structure designed for leisure time, but as a condition for sustainability of the settled activities and the environmental quality of the entire area [31]. An evolution, therefore, in the vision of open spaces which, from residual and reserve spaces, subject to protection with the sole function of setting limits to the built-up area, become active and structuring elements of urban development. It constitutes an innovation in the idea of the park, as it combines the features of usability, accessibility, and aesthetic enjoyment of the urban park with the productive agricultural function which, developed in environmentally compatible terms, represents a prerogative of sustainability. These are no longer parks just for leisure time, but areas where sustainable multi-functional agriculture acts as a driving force for the entire structure. The countryside meant as a garden for the city, a place of production and pleasure at the same time.

The agricultural use of peri-urban territories also guarantees soil permeability, hinders erosion phenomena, and ensures groundwater recharge [32]. Therefore, it is opposed to serious phenomena of degradation and environmental danger and lends itself to interventions that, on the one hand, safeguard the traditional functions of peri-urban agricultural activity and, on the other, develop new functions in response to the new demands of the contemporary city. The maintenance of the productive function is in this sense a compulsory step and all the others descend from it.

From the environmental point of view, agricultural parks (and green areas in general) play a fundamental role in purifying the air. They are, in fact, active in the immobilisation of some particular pollutants (dust, heavy metals) and in the metabolisation of gaseous

substances (CO, NO<sub>x</sub>, H<sub>2</sub>S) emitted by some anthropic activities that are mainly located in or near the city (industries, vehicular traffic, heating systems, etc.) [33].

The agricultural parks in Italy, which also respond to the need to support peri-urban agriculture that for many decades was considered ‘transitory’, have in common—despite the diversity of the territorial contexts in which they have developed and the different strategies implemented for their establishment (top-down or bottom-up)—the objectives of environmental protection and biodiversity, the protection and enhancement of the landscape and culture of the rural territory, the preservation of the soil (against building squatting), the enhancement of multifunctional agricultural activities as strategic elements of territorial development, as well as recreational, cultural and educational use. It is clear that, depending on the type of park, substantial differences emerge: in some cases, there is a greater propensity towards environmental protection; in others towards the promotion of agricultural and recreational activities. However, the identification of the objectives depends above all on the specific features of the area in which the park is set up and its socio-economic and cultural characteristics. As in the cases of the Parco Agricolo di Ciaculli in Palermo and that of the Pasm, activities that move towards the multifunctional enhancement of agriculture, as well as those linked to production and marketing and environmental sustainability, are highly encouraged.

### 5.1. The “Parco Agricolo di Ciaculli”

The area covered by the Parco Agricolo di Ciaculli is the last extensive agricultural area in the municipality of Palermo. It covers an area of 850 hectares in the districts of Ciaculli and Croce Verde and constitutes the last strip to the east of the plain of Palermo, representing a green lung for the city (Figure 2). To the north it joins to the urban edge of Palermo and looks out towards the sea, to the south it closes in on the Monte Grifone mountain system. Its agricultural and socio-economic characteristics make it part of the residual peri-urban strip that has survived urban expansion. Given the prevalent agricultural use of its soils, Ciaculli, which has maintained the original features of the historical rural landscape of the vast plain of Palermo (covering about 100 square kilometers and called Conca d’Oro) at the beginning of the 20th century, represents, in terms of the level of intensification and homogeneity of cultivation, the largest agricultural and mandarin area in this area.

The main factors that have contributed to the development of mandarin-growing in Ciaculli are the soil and climate characteristics, such as the depth of the soils, which allow extensive root systems to develop, the balanced texture and structure, which allow water to be constantly maintained in such a way as to prevent asphyxia, the rich supply of organic substances and mineral nutrients, a mild climate with plenty of sunshine, the frequent presence of winds that keep the relative humidity low, and a very rich water table [34].

The main crop is the Mandarinino Tardivo di Ciaculli (<https://www.tardivodiciaculli.net/prodotti/mandarino-tardivo-di-ciaculli/> (accessed on 20 May 2021)), which occupies about 80% of the current utilised agricultural area (UAA), followed by the Avana mandarin, the giant red medlars of Ciaculli, lemons, and small quantities of apricots and oranges.

One of the important peculiarities of the ‘Tardivo’ is that its trees grow on very steep slopes, such as those that characterise the agricultural park, with gradients of up to 50%. This is why the land was terraced at the beginning of the century (using pieces of rock, known as ‘ciachi’ or ‘ciaca’, which fell from Monte Grifone) and monorails are used in the steepest areas to facilitate harvesting (Figure 3).

The Tardivo is also the identity element of the agricultural park, which has made it its flagship. A Slow Food Presidium since the end of the 1990s, it has become a reference product for consumers as well as being widely used in confectionery and cosmetics, which make use of its rich essential oils. Known locally as ‘marzuddu’, the mandarin used to ripen in March (i.e., late), but today, due to the ongoing climate change, it is harvested a month earlier and is therefore not difficult to find them on the market as early as February.



Figure 2. The “Parco Agricolo di Ciaculli” location. Source: [https://umap.openstreetmap.fr/ja/map/parco-agrumicolo-di-ciaculli\\_262087#13/38.0878/13.4932](https://umap.openstreetmap.fr/ja/map/parco-agrumicolo-di-ciaculli_262087#13/38.0878/13.4932) (accessed on 5 July 2021).



Figure 3. Pictures of the “Parco Agricolo di Ciaculli”. Source: elaboration of authors on images <https://www.tardivodiciaculli.net> (accessed on 20 May 2021).

The production and sale of the ‘Tardivo di Ciaculli’ mandarin are managed by the ‘Consorzio il Tardivo di Ciaculli’ (<https://www.tardivodiciaculli.net> (accessed on 20 May 2021)), which also aims to be a means of preventing the social, economic, environmental, and landscape degradation of the park area, and a means of enhancing the value of the historical buildings, beams, and villas, which were once closely linked to the agricultural world and are now in danger of falling into disrepair.

The park project, prepared by the Confederazione Italiana Agricoltori (Italian Farmers Confederation), was financed under the European Community’s Life programme in 1994 (the project was presented under the Life94 programme under the name “Agricultural management model in a peri-urban area of Palermo”) and was implemented between 1996 and 1998. Close dialogue with the municipal administration, which was drafting the General Regulatory Plan (PRG) at the time, gave the project further strength by including the project area in the town planning instrument and thus formally recognising its intended use. The aim of the project, which won the Sustainable Cities Award in 1999, was to define a management model for a peri-urban agricultural area by safeguarding the traditional functions of peri-urban agricultural activity and, at the same time, developing new functions in response to the new demands of the contemporary city. The preservation of the productive function was in this sense a compulsory step [35].

The park [34] has been created starting from the elements of the historically formed agricultural system, highlighting their role in defining the specific overall relationships and their degree of persistence, and planning interventions for the conservation, recovery, restoration, or replacement, based on their intrinsic value, of architectural and environmental assets. The entire area was affected by interventions to safeguard the traditional functions of peri-urban agricultural activity, in particular, the productive function since the best protection of territory is achieved by assigning or maintaining compatible uses. The recovery project focused on the environmental requalification along the foothills, through the arrangement and recovery of abandoned and degraded areas, the restoration of some elements of the terraced agricultural landscape and the creation of a 5 km long path, the main axis of the project, which winds along the whole terraced foothills, between 100 and 200 m above sea level, and crosses private agricultural lands, allowing accessibility and fruition to visitors.

Alongside this axis, a system of routes has been identified which is divided into three types: routes of historical and architectural interest, routes of landscape and environmental interest, and mountain paths. The first step was to choose a network of routes structured on existing tracks, to recover the “bagli” (buildings containing a courtyard) and reuse them for social, residential, and park service purposes, and to redesign the access to routes leading to them. In addition, a series of maintenance, restoration, and partial reconstruction works have been carried out on the dry stone walls (approximately 5000 m), using traditional techniques, as well as works aimed at restoring the slopes by planting trees and shrubs (approximately 6000 species) typical of the woodland and Mediterranean scrub (walnut, azarole, rowan, mulberry, olive, almond, etc.). The agroforestry and renaturalisation measures concerned, in particular, the mountain slopes (about 15 hectares) affected by floral impoverishment and abandonment of olive and almond groves with consequent hydrogeological instability. The actions carried out mainly concerned the reforestation of the slopes through naturalistic engineering measures to counteract the disruptive effect of rainwater running downhill. In addition, work has been carried out to restore abandoned citrus groves identified in the analysis and project phase.

The interventions have aimed at their recognition, defense, and valorisation, being aware that they are positive externalities that for the most part cannot be represented in the company’s balance sheet, but must essentially be recognised as benefits of collective interest and supported by public interventions.

In the same direction are the measures aimed at enhancing the park’s two particular environmental and cultural functions directly linked to the history and tradition of the Conca d’Oro, such as the creation of the Garden Museum of Agriculture of the Conca

d'Oro and the Museum of Germplasm of the Conca d'Oro and the Varietal Comparison Field, consolidating the relationship between research activity (the Institute of Arboreal Cultivation of the University of Palermo and the C.N.R.) and production activity.

An important element in the realisation of the park was the participation and sharing of the entire process with the local players, also because it had the merit of intervening in an area and a sector in economic crisis, giving a response that contained, as far as possible, elements of revitalisation.

To this end, an intensive sensitisation and information campaign was carried out before the start of the works, since the consent of the owners of the land concerned was necessary for the implementation of the project. A census of all the owners was carried out and an agreement was drawn up for the authorisation of the work by private individuals. The interventions involved a total of about 400 land parcels and the consequent signing of 400 agreements with the same number of owners. The involvement of the local actors was then carried out through the presentation of all the project phases and their verification with the inhabitants-farmers who own the agricultural areas, the adhesion and active participation in all the project phases of the inhabitants-producers, and the establishment of a co-operative of unemployed people living nelle frazioni di Ciaculli e Croceverde Giardina (Cooperative "Il nespolo") for the execution of all the interventions [36].

The agricultural park of Ciaculli is, therefore, based on a conception of agriculture which operates as an active process and which determines, over a long time, changes in the territory in ways connected both to the protection and recovery of the landscape but also to the pursuit of productivity and economic rationality, and at the same time also expresses the production of the environment and services.

The idea is that territory of significant extension cannot be managed and economically sustainable by using only public resources in the future, but on the contrary, a policy of incentives must be envisaged, mobilising largely productive private resources.

## 5.2. The Parco Agricolo Sud Milano (Pasm)

The Pasm ([www.cittametropolitana.mi.it/parco\\_agricolo\\_sud\\_milano](http://www.cittametropolitana.mi.it/parco_agricolo_sud_milano) (accessed on 20 May 2021) covers 47,033 ha, about 30% of the total surface area of the Metropolitan City of Milan (Lombardy Region). The utilised agricultural area (UAA) is 30,000 ha and there are approximately 1000 farms in the territory. The area includes the plain south of Milan and involves 60 municipalities (Figure 4). The park was established by Regional Law n. 24 of 1990 (later replaced by Regional Law n. 16 of 2007) as a regional agricultural park and a regional park of the metropolitan belt. As there is no legislation in Italy explicitly concerning agricultural parks, the regulations of Pasm are inspired by the principles of regional law no. 86 of 1983 concerning the General Plan of regional protected areas. Its management, originally entrusted to the Province of Milan, is now the responsibility of the Metropolitan City of Milan. Pasm only began to be operational in the early 2000s [8].

The aims of the park, defined by the regional law of 2007, are to protect and restore the landscape and environment of the strips linking the city and the countryside, to connect the external areas with the urban green systems, the ecological balance of the metropolitan area, the safeguarding, qualification, and development of agro-silvicultural activities, and cultural and recreational use. The managing body, the Metropolitan City of Milan, is flanked by the Metropolitan Council and the Governing Council as governing bodies; the Assembly of Mayors, an Agricultural Technical Committee, and a Landscape Commission are also involved [8]. The planning instruments of the Pasm are the Territorial Coordination Plan (Ptc), the Management Plan, the Sector Plans, and in particular the Agricultural Sector Plan.

Agriculture is undoubtedly the driving activity of the system of territorial and environmental protection: its main characteristic is, therefore, that of conserving the territories of an agricultural nature by enhancing the value of various crops ranging from maize to rice, meadows, and autumn and winter cereals. It is no coincidence that one of the main "themes" represented is agriculture and the protection of agricultural activity understood



as the complex of operations aimed at cultivation, the management of forestry resources, livestock breeding, as well as the processing and marketing of products. However, given that this is multifunctional agriculture, it is important not to overlook the set of activities aimed at the use of the territory by citizens and the management and maintenance of the environment. The use of the area is a further distinctive element of the park, in addition to its landscape purpose. These issues are addressed through the activation of several services: food production, catering, direct sale, accommodation, environmental education, environmental services, landscape and biodiversity maintenance, sports activities, rural tourism itineraries.



**Figure 4.** The Parco Agricolo Sud Milano (Pasm) and its municipalities. Source: <https://www.assparcosud.org/comuni-e-bellezze-del-parco-agricolo-sud-milano/> (accessed on 20 May 2021).

Tourism and the possibility of developing routes linked to sustainable mobility were the focus of the “Landscape Expo Tour”, which involved 30 municipalities in northeast Milan, from Arese to the Parco Sud to Cusago and Gaggiano. The project was born out of reflections on the Expo (2015) and thanks to the contribution of Fondazione Cariplo and the support of the municipalities of northwest Milan, whose target was to enhance and enjoy a renewed identity of the landscape of the places involved. The project looked at the possibility of creating a system of natural, historical, and architectural resources and agricultural and food production through the creation of green tour itineraries that can be traveled by bicycle or on foot to introduce residents and tourists to the area, its landscape, and its excellence. In this project, the support of the Pro Loco and local authorities was important, as they encouraged the activation of participatory processes and wider involvement of citizens. In particular, the “Let 4. Terre d’Acqua e Cascine” itinerary, 28 km long (<https://www.parcagricolosudmilano.it/itinerari/98-let-4-terre-d-acqua-e-cascine.html>) (accessed on 20 May 2021), which takes place in and explores the Parco Agricolo Sud Milano, along the Naviglio Grande that overlooks Gaggiano, identifies four main objectives: cultural promotion, landscape-environmental qualification, enhancement of usability and economic sustainability (Figure 5). There are many other itineraries in the park that refer to a wide range of themes: from the wealth of cultural resources to the

environment and landscape. Eighteen itineraries are proposed by the “Cartoguida” of the Italian Touring Club [37], which, through a map and a booklet, aims to inform users about the four different purposes—nature, landscape, history, agriculture—that have given rise to the park, underlining the uniqueness of the places and the extraordinary heritage that potential tourists can enjoy. Museums, abbeys, farmsteads, irrigation ditches, rice fields, mills, ancient icehouses, lakes, woods and nature reserves are the icons of a landscape whose historical cycles are the result of a significant sedimentation of territorial resources, through which the history of places, territorial knowledge and rural memory can be told (Figures 6 and 7). Not only is tourism stimulated by slow mobility practices, but also linked to agri-food activities and farm holidays. “Parc—agricultural products in catering”, a project conceived thanks mainly to the collaboration of 22 Pasm companies to meet the growing demand for local and quality products and to strengthen the link between producers and consumers, is aimed at the latter.

The project’s distinguishing features are the preservation and enhancement of tradition and local agri-food specificities, of the rural and peasant world. In this case, tradition has been combined with technological innovation, where an app has been created to access the park, its farms, and specific products via a virtual tour ([https://opencms10.cittametropolitana.mi.it/parco\\_agricolo\\_sud\\_milano/applicazione/index.html](https://opencms10.cittametropolitana.mi.it/parco_agricolo_sud_milano/applicazione/index.html)) (accessed on 20 may 2021).

The app has been recognised as a privileged tool for disseminating knowledge and wider use of the park’s places, nature, agriculture, landscape, and history. The technological dimension has been consolidated and enriched by also embracing the possibility of “accessing” augmented reality content. This is an innovative way of getting to know the territory, its heritage, and the initiatives that Pasm promotes.

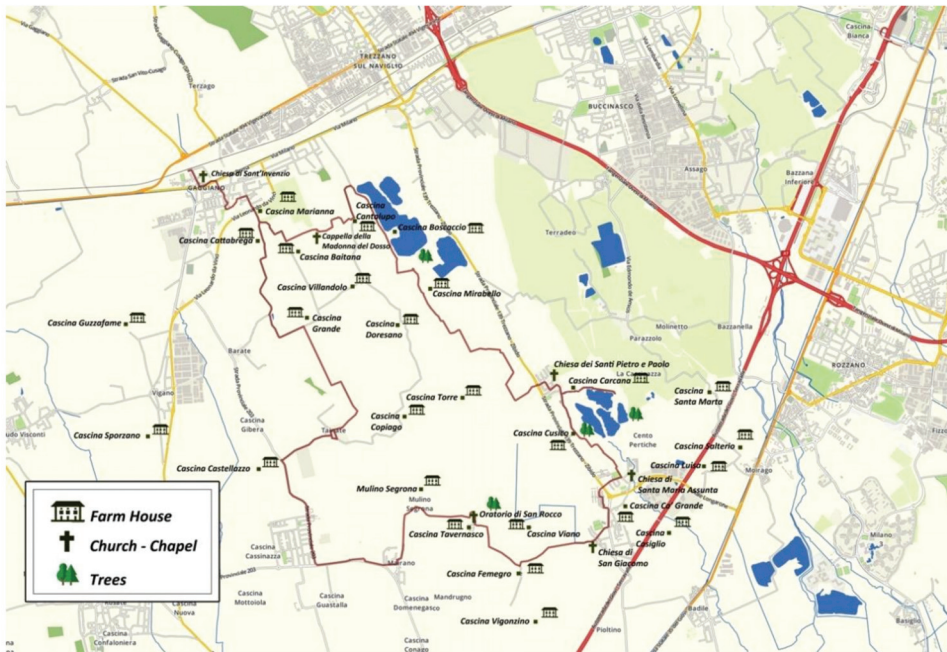
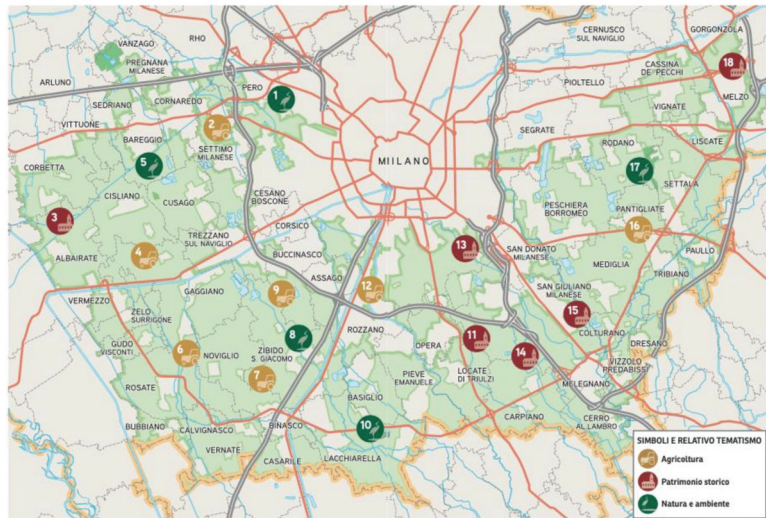


Figure 5. The “Let 4. Terre d’Acqua e Cascine”: an itinerary for the peri-urban tourism’ sustainability. Source: elaboration of the authors.



- 1 • Da Milano città al Parco dei Fontanili di Rho
- 2 • Tra Cornaredo e Settimo Milanese
- 3 • Tra le ville di delizia di Corbetta fino ad Albairate
- 4 • Da Cisliano fino all'Alzaia del Naviglio Grande
- 5 • Da Bareggio a Cusago
- 6 • Da Gaggiano a Calvignasco attraverso Rosate
- 7 • Tra natura e castelli
- 8 • Tra risaie e cicogne
- 9 • Da Buccinasco al Naviglio Pavese
- 10 • Da Lacchiarella a Basiglio
- 11 • Da Locate di Triulzi all'abbazia di Mirasole
- 12 • Là dove fiorisce l'agricoltura a Milano...
- 13 • Da Milano all'abbazia di Chiaravalle
- 14 • Da Melegnano all'abbazia di Viboldone
- 15 • Attorno a rocca Brivio
- 16 • Dall'Idroscalo al canale Addetta
- 17 • Attorno alle sorgenti della Muzzetta
- 18 • Da Gorgonzola a Melzo

Figure 6. The Italian Touring Club itineraries. Source: [37] <https://www.touringclub.it/itinerari-e-weekend/18-itinerari-nel-parco-agricolo-sud-milano-scaricali-gratis> (accessed on 20 May 2021).



Figure 7. Pictures of Pasm. Source: elaboration of author on images of [37] <https://www.touringclub.it/itinerari-e-weekend/18-itinerari-nel-parco-agricolo-sud-milano-scaricali-gratis> (accessed on 20 May 2021).

Therefore, the park is progressively implementing various projects that also include innovative proposals from the point of view of digital technologies to strengthen the tourist offer in the face of an increasingly demanding demand. It is necessary to strengthen integrated and long-term strategies, to be developed together with the various stakeholders—citizens, enterprises, institutions, associations—also with a view to the realisation of a coherent and effective tourism communication strategy. The park’s managing body still lacks an overall strategic vision and a proactive approach, limiting itself almost exclusively to pursuing a defense policy. In many cases, innovative projects have been carried out not by the authority, but by committees, local associations, and private bodies.

Although the park and its territory have a more agricultural vocation, with particular attention to the care and preservation of the environment, innovation could come from more creative forms of tourism.

## 6. Results

The existence of relations between the urban and rural components implies the idea that there is something that can be called “urban” and something else “rural”. The need to distinguish between these two territory’ conditions has led to various proposals and experiences. From a more purely legislative point of view [38], the policies that have variously concerned the urban–rural relationship (which can be traced back to three types of approach: formal, constraining, and programmatic) have highlighted different forms of relationship between these areas that can be summarised in three typologies: the subjugation of rural to urban space, maintenance of a clear separation between rural and urban, and creation of hybrid spaces.

However, “urban” and “rural” are not entities that exist independently of human practice and special interests: rather, the nature and character of these categories depend on how they are defined.

Of particular interest in this type of relationship is the portion of land in contact with the two areas, or rather at the border of both, where one ends and the other begins. An increasingly blurred space that is not clearly defined [2,13,39–42], which sees, on the one hand, the urban “infiltrate” and branch out into the rural, on the other hand, the rural does not completely give way to the urban, maintaining “enclaves” within the urban component. This dynamic translates into what is today, among other definitions, identified as peri-urbanization.

These borders’ territories are crossed by flows of people and materials [1], economically, politically, socially, and physically through issues such as housing, employment, education, transport, tourism, and resource use. In some cases, these flows are predominantly unidirectional (as in the case of cultural activities or waste flows), while in other cases there are important flows with a bidirectional character (as in the case of recreation and tourism), connecting and mixing urban and rural areas, farmers and citizens, and generating multifunctional activities.

As highlighted by the study cases shown, if properly managed through the creation of agricultural parks, the peri-urban areas can become poles of attraction for urban contexts that give them new functions combining environmental regeneration with the supply of quality food products, the creation of playgrounds, and recreational spaces with training and educational activities [43]. Moreover, this governance tool allows farms to enter new markets and expand their activities, contributing to sustainable development by involving their stakeholders and communities around common targets [44].

In particular, the characterising factors of the agricultural parks analyzed, in terms of enhancing the value of peri-urban open spaces in touristic terms, are as follows:

- rediscovery and re-use the rural characteristics in terms of dynamic valorisation, and the implementation of a model of diversified and multifunctional agriculture oriented towards tourism;
- ecological-environmental rebalancing of the city–countryside relationship;
- restoration and environmental landscape;

- rehabilitation of the agricultural habitat;
- revitalisation of an identity production function through a sustainable economic model;
- protection, enhancement, and sustainable development of land resources;
- maintenance of biodiversity, i.e., maintaining sufficient variability within each species to ensure that its genetic potential can be used for the future;
- participation and involvement of citizens and local players to make them reappropriate a portion of the territory that was previously inaccessible.

## 7. Discussion

The process of urbanisation will continue to grow exponentially in the coming decades and cities in all countries have to face the challenges posed by urban sprawl. This strong urban sprawl does not, however, manifest itself as a clear advancement of the urban boundary at the expense of the rural, but by creating an intermediate zone where the two categories blur into one another. Much of the territory of Europe is neither distinctly urban nor rural but something ‘in-between’ [45]. These marginal territories see a progressive abandonment of arable land and fragmentation of natural and agricultural areas.

The redemption of these territorial areas passes through the enhancement of open green spaces i.e., ‘predominantly unsealed, permeable “soft” surfaces’ [46] (p. 96), which have been spared from widespread urbanisation.

However, this action has to be accompanied by a planning action defining the development strategy (a medium- to long-term “vision”) and framed in a management framework able to guarantee the relationship between different administrative levels, with the specific participation of local corporations and civil associations.

The importance of planning open spaces is underlined by Sandercock [47] (p. 134), who states that “[planning is] an always unfinished social project whose task is managing our coexistence in the shared spaces of cities and neighborhoods in such a way as to enrich human life and to work for social, cultural, and environmental justice”. This means that planning green open spaces in the peri-urban territories, through defining the economic model and strategic vision, is a central issue for sustainable development. In this framework, agricultural parks could be a possible answer and can act as driver for the development of tourism in these territories as long as are able to define a strategic vision focused on agricultural, recreational, social, ecological, and didactic functions.

More in detail the agricultural-productive function, has to be devoted with particular reference to the recovery of traditional cultivation techniques and the planting of organic crops, i.e., that respect the natural cycle of plants without the use of chemicals, fertilisers or anything else that could pollute the soil or groundwater; the recreational function has to be developed through the creation of routes and the recovery of rural structures already present in the area to be converted into agritourism to which the organisation of events can be added, such as theme days dedicated to the tasting of typical products or cultural events linked to food, to bring citizens closer to the countryside and to amortise the park’s management costs; the social function, has to be implemented through the involvement and participation of residents and the various local players, to create a strong sense of identity and possibly extended to weaker categories (the elderly, the handicapped, children) or to people assigned to perform socially useful tasks; the ecological-environmental function, has to be focused on the development of an environmentally friendly agriculture, oriented to contribute to the protection and conservation of resources (e.g., protection of land from soil sealing) and the bioclimatic balance of peri-urban ecosystems; and finally the didactic-scientific function, must be oriented to enter into agreements with universities for the creation of research laboratories, or with schools to develop environmental education programs to bring students closer to nature, a fundamental action to spread respect for the environment in future generations.

In this context, from the case studies analysis, some particularly significant elements emerge as central to ensure that agricultural parks can be a tool for tourism development.

The first concerns participation and sharing with the various local players, as in the case of Ciaculli Agricultural Park, both to define the feasibility of the project, the timing, phases, and methods of implementation and to identify priority objectives, and to build an identity. The main promoters of the agricultural park will be its inhabitants and the farmers working there. If they do not feel part of the project, if they do not feel the place as their own, any activity and initiative will be doomed to failure.

The second concerns the choice of management model, which is fundamental for maintaining the functions of the agricultural park over time. As shown by the case of the Ciaculli Agricultural Park, the management of the park could be entrusted to agricultural cooperatives through specific agreements, which define the compatible activities and prescribe the methods of implementation, the timeframe, and the possible interventions. This hypothesis could allow farmers to use productive land in public ownership at an affordable cost, while it would guarantee the revitalisation of areas that would otherwise be abandoned, as is often the case. In addition, the proceeds from the sale of agricultural products could be used, in part, for park maintenance and for strategies to promote and market agricultural products.

The third, as in both analyzed cases, concerns the choice of interventions and activities that take into account the compatibility with the natural vocation (present or past) of the area, the availability of renewable resources, the connections and interactions with neighbouring areas as well as the main user needs to be satisfied. Without such attention, the risk will be to create landscapes without identity, or in the words of Augè, “non-places” [48].

The last concerns the use of digital technologies, as shown by the case of Pasm, to develop sustainable tourism. Today touristic flows are mainly oriented by virtual certifications of quality (such as Tripadvisor, Booking or similar) and tourist tends to create personalised routes, so the parks will attract more tourists the more information and digital tools they can put on-line.

## 8. Conclusions

With the acquisition of the multifunctional agricultural character, peri-urban territories become “territories of agro-food production, reserves of environmental quality, a tool for the containment of land use, a place of production of goods and services of a public nature” [43] (p. 29). In other words, the peri-urban area takes on the compensatory role of the widespread urban reality, due to its production of environmental, ecological, cultural, landscape, and production values.

From this perspective, agricultural (peri-urban) parks are a fundamental tool for combating the ‘marginality’ and abandonment of peri-urban spaces, triggering development processes centered on a plurality of sustainable activities ranging from agriculture to tourism, and leisure. Leveraging on these, it is possible to reconcile the city and the countryside from different points of view (social, economic, spatial) and thus fulfill the aims of multifunctional agriculture, oriented towards the production of externalities, capable of satisfying a high demand for food, recreational and cultural goods [49]. To all this must be added the necessary activation of participatory processes; of an action strategy that involves not only the institutions but also and above all the population.

However, for peri-urban areas to be able to provide effective responses to the community, triggering local development processes, it is essential that the multifunctionality of agricultural parks functions as it does in some “real” rural farms, i.e., that a potential tourist demand is also addressed and intercepted: the conditions must be created so that the tourist-consumer not only has the opportunity to enjoy the places but also to implement new tourist experiences that allow the local resources to be enhanced and the potential of the areas to be discovered. It is a question of building a relational path between the tourist and the territorial context by looking at the actual production activity: an exchange thus takes place between the tourist who has access to the resources and the production cycle and the producer who transfers his/her knowledge and territorial know-how. The final

objectives become the places and their particular resources knowledge, and the creation of itineraries linked to environmental culture, wine and food culture, psychophysical wellbeing, etc. Given that rural tourism is receiving a very positive response in Europe, particularly in countries most sensitive to sustainability and eco-sustainability strategies, for agricultural parks to encourage peri-urban territories renaissance through tourism, in addition to activating specific development policies and planning tools, they must become true sustainability hubs. In this framework, the objectives of sustainable tourism—environmental preservation, zero-kilometer agriculture, typical products and resources, uniqueness of places—must become shared elements towards which the “activities” offered by the park should be directed. Rural (peri-urban) tourism thus becomes an important driver of local sustainable development, when integrated with multifunctional agriculture in a coordinated management framework. While caution should be exercised about emphasising the importance of tourism as a significant asset for local development, encouraging sustainable tourism could be a way of boosting the activities of agricultural parks and, in so doing, creating links and synergies between forms of protection, conservation, and local economies.

### 9. Limitations and Future Research Directions

The first experiences of Italian agricultural parks date back to the ‘90s, but it is from the beginning of the new millennium in particular that we see a greater diffusion of them supported by the growing awareness of the important role played by peri-urban agriculture, diversified and multifunctional, in safeguarding the quality of rural, urban and interstitial spaces. Even today, we are witnessing a proliferation of experiments that are not entirely clear whether they are ongoing, in the process of being defined, or finished, whether they are institutionally recognised or whether they are merely the result of an initiative by private citizens and/or planning companies.

However, this proliferation has not been accompanied by analogous normative and scientific production. If on the one hand this has opened up an avenue for new research, on the other it certainly represents a limitation that has resulted in an eminently theoretical and descriptive approach to analysis.

A limitation has also been reflected in our study, which has embraced an eminently theoretical and descriptive approach to analysis. However, precisely because of these characteristics, we intend to lay the foundations for a further in-depth study: in fact, we are currently working on the definition of an assessment matrix through which to analyze the specific features, the actions, the aims, the managing bodies (if any), the management strategies and the players involved, the main potential and the weak points in relation to the territory and its resources of the Italian agricultural parks.

The matrices identified on the basis of the distinctive characteristics of each agricultural park identified will be a contribution to understanding the role they play in territorial governance strategies and in the spatial planning process. At the same time, they will represent a useful tool for understanding whether this type of park can be identified as a system of functions and services for the regeneration of territories and the sustainable development of peri-urban territorial capital: in other words, an ecological unit of protection and territoriality.

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Article

# The Valorization of Italian “Borghi” as a Tool for the Tourism Development of Rural Areas

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**Abstract:** The paper comes from the need to search for criteria useful for the valorization of heritage towns, located in rural and/or inland areas of Italy, now affected by depression and depopulation process. To this end, the authors point out how territorial identity can constitute the theoretical foundation to influence development policies and, in particular, tourism development for the sustainability process. It was therefore decided to interview a number of stakeholders who could contribute, with their professionalism and expertise, to identifying possible paths and processes for the enhancement of these areas for tourism development. The methodology was based on in-depth interviews, which allowed for the identification of a Strength, Weakness, Opportunities and Threat (SWOT) analysis, offering a guideline for the correct governance of these rural areas for their tourist enhancement in terms of the sustainability of development and tourist attractiveness. The study is an observatory that will monitor the implementation of sustainable tourism enhancement of the “borghi”.

**Keywords:** “borgo”; tourism development; rural area; sustainable tourism



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## 1. Introduction

The paradigm of sustainability, as known in the literature, can be declined in different areas, being directed to hand over to future generations the resources that today we may have available in quantity and quality. The attention, protection, and care of resources that is evoked in the international arena come from the exploitation that occurred and was perpetuated in the nineties of the last century and has affected all territories and especially those where there has been massive urbanization and population density. Other territories, particularly those located in some rural and inland areas, have been neglected by housing policies and consequently abandoned as they do not possess the typical characteristics of large cities, such as being close to the coast, accessibility, having much more water resources, and being the center of trade. Just in these areas today, the state of abandonment has made their conditions even more worrying both for the purposes of the cohesive and sustainable development of the country, and for the recorded degradation in terms of natural resources but also human resources.

The state of backwardness of these areas today has emerged thanks to the spread of the pandemic that has pushed many people to move away from urban centers to find in these places open spaces where the contagiousness can be reduced, where they can spend long periods of time, and where they can enjoy an authentic and slow lifestyle away from the hectic life of cities and metropolises [1].

The demand to stay in these places has brought out their unexpressed potentialities, but also their limits, especially considering all the houses that are now abandoned and in a serious degradation state, but if properly renovated, are able to welcome not only tourists, but also new generations. Certainly, in order to make these places hospitable it is not only

necessary to renovate just the houses, but the state of abandonment also concerns a whole series of services and common goods, which are crucial for stable housing.

The backwardness of these areas, in fact, has very deep roots, derived on the one hand both from the abandonment of these places especially by young people, who, having no possibility of high rank training and employment, have preferred to migrate, and on the other hand, by the progressive aging of the population that remained there.

This heavy depopulation has caused a loss of skilled labour and withdrawal from industries and businesses, causing both economic and socioenvironmental degradation and at least the decay of biodiversity and cultural heritage.

As the geographic literature shows, the possible remedies historically followed at least three approaches. The first is the so-called “conservative” approach that suggested keeping a minimum level of services for the population to discourage further abandonment. With the second approach, the “compensatory” one, the definitive departure of traditional residents was accepted but measures were put forward to attract new ones. The third approach, the “multifunction” one, was derived by the overlapping of the concepts of inner area and rurality, both expressing territorial marginality [2]. However, all three approaches have failed to motivate the remaining residents to improve themselves—agricultural multifunctionality has not made these areas competitive and innovative—and as a result, these areas are in an even more pronounced state of decline today than they were in the 1990s.

If this process of decay began since the second half of the last century, in the Middle Ages or the Renaissance up to the nineteenth century, they were vital centers, pulsating with economic activity and trade.

Restoring these territories back into dynamic and attractive towns is certainly a long-term process due to the current conditions, which on the one hand may be attractive to tourism due to the conservation and the authenticity—consisting of cultural and social identities, traditions, memories, intangible connections, local peculiarities, and rural landscapes—of their tangible and intangible cultural heritage, but on the other hand are still a long way from sustainable and technologically advanced development capable of attracting investment [3].

Most of these towns have been identified in Italy and are so-called “borghi”, characterized by a maximum of 5000 inhabitants and—as written in Ministry of Cultural Heritage and Cultural Activities and Tourism (MIBACT) directive n. 555/216—“by a precious cultural heritage, whose preservation and enhancement are factors of great importance for the country system as they represent authenticity, uniqueness and beauty as distinctive elements of the Italian tourist offer”.

Today, they constitute the backbone of Italy, covering a territorial surface of about 54% of its total territorial surface and in some regions reaching even 70–80% of the total regional surface. This expanse of surface does not correspond to the anthropic aspect since the resident population is 17% of the total Italian population, and in some regions, this average percentage still drops compared to the regional resident population.

These towns have wide margins of residential accommodation in a landscape strongly marked by agricultural production, from vineyards to olive trees, from farmhouses in the plains to mountain pastures, and from pastures to terraces, which counteract the degradation and hydrogeological instability.

Many of these towns are characterized by a rural landscape and many others are located in the mountains or on the coasts. However, all of these are very different in their resources and Heritage, which are rich in content, interconnected and integrated, and together with their strong anthropological characteristics, refer to the culture and lifestyles of the settled communities [3]. For this reason, this paper will investigate if these towns, now so depleted to this economic and social development—so they seem to be villages—can come back as an original town, full of life and able to attract tourism. The element that can give a push to activate a new development and transforming the actual villages into

original and authentic towns is their sedimented territorial identities, an element strictly necessary to tourist development.

The territorial identity, in fact, can be defined “by the combination on a given space of a set of situations, extensions, objects, occurrences/presences”, consequently of the community, which has the ability to preserve “the interpretative memory of territorial acting, in project, at both local and global scales, passing through all the intermediate levels” [3,4].

The complexity of the process of territorialization is not adequately considered when addressing the policies of the enhancement of the “borghi” for purposes including tourism, but, in fact, thanks to this very process, it is possible to transform that memory and knowledge into a project, since this memorial competence does not concern only the constitutive territoriality but all territorial articulations [4]. The process of territorialization is not only abstract, but provides for the denomination, reification, and structuring that give shape to that project that the community, with its memorial knowledge, identifies.

The paper intends to start with the concept of territorial identity as a tool to represent the different values expressed by the “borghi”, such as authenticity, beauty, and uniqueness, and illustrate the fundamental role of residential communities for a new model of tourist development above all in rural areas despite the depopulation and the lack of innovation, increasing the development gap with urban areas [2].

After the pandemic, the slow and open-air lifestyle has launched a process of revalorization of the “borghi” that attracted many smart workers—the people who work online in remote jobs—to become temporary residents and thus changing these communities. This new input into these communities has revealed weaknesses but also opportunities for new tourist destinations.

To deepen this phenomenon, the authors have interviewed some stakeholders, trying to verify what the current sentiments are about the “borghi” and the possibility of going beyond the conservative model, which until now has prevailed in our country, to enhance the “borghi” in terms of attracting new tourist flows. The interest aroused by this mode of study and analysis has given rise to a monitoring unit, which, therefore, will not end with the writing of the paper, but will continue precisely because of the interpretative and trans-sectoral and transdisciplinary fallout that involves the formulation of this new model of tourism in the “borghi”.

The paper is structured into five sections. After the introduction, there is the theoretical background section dedicated to the analysis of the main provided contributions in the management and economic geography disciplines on the theme of the “borghi”. The third section describes the research method, developed based on the in-depth interviews. The fourth section shows the results based on an integrated reading of the desk and field information collected, according to the “lens” of the consulted scientific literature. Finally, the conclusion section illustrates the theoretical and practical implications, as well as the main limitations and possible future developments.

## 2. Theoretical Background

The enhancement of rural areas cannot ignore a new form of territorialization in which the “borghi” are the main axis from which to start to give coherence and cohesion to the whole Italian system [5].

Recently, the Encyclopedia of Tourism Management and Marketing has included among its entries of “borgo” as a place located in rural or peripheral areas, characterized by authenticity, uniqueness, and beauty, but also social values, traditions, culture and landscape, and the ties and emotional connections between inhabitants and territory—factors that define their territorial identity. The “borgo” is a place where the tourist seeks a recreational, entertainment, and cultural experience, but above all on that is immersive and linked to the encounter with a local reality and a community from which one comes out enriched [6].

The gap that exists today between developed and backward areas, in fact, can be traced, in addition to the geomorphological and infrastructural problems, precisely in the need to reform the community in the “borghi”, which, on the one hand, has the memory [3], and on the other hand, is able to interpret the process in place using the most appropriate tools to finalize the efforts towards a participatory and shared production of resources.

In this direction, the “borghi” should be considered “from the perspective of those who live it, experience it, practice it, as well as those who talk about that cannot be disregarded” [7] and ultimately, we cannot disregard the formation of identity, conceived in its processual and dynamic character, with the polysemic implications derived from the different open, complex, and transcalar settings [7] that reflect the peculiarities of the territory itself.

The enhancement of the “borghi”, therefore, cannot disregard the formation of the identity itself, as has been expressed in the existing literature—in particular the geographical—directed to outline the determinants of territorial identity, or those environmental factors, those tangible and intangible cultural assets, those socioeconomic trends for which the “borgo” has the ability to produce value thanks to the “localized set of common benefits that produce collective advantages” [8] and the competitive capacity [7].

“It must be emphasized, in fact, that the territory, as well as a universe of experiences, feelings, perceptions, as well as conflicting relationships and geometries of power, is also a concrete entity to be organized and managed, and to make a study of territorial identity useful at the moment of decision-making and planning” [6]. Representing territorial identity means identifying the social system that includes people, traditions, culture, and landscape, keeping in mind the emotional links and connections between the inhabitants and the territory [9].

Ultimately, territorial identity is constantly evolving due to the external and internal agents of the territory that modify its codification as well as the behavioral traits of collective and private action [10,11].

Territorial identity is relationship, a “social construct” [11] consistent with cultural, political, ideological, and ethical processes that is in continuous synergy with cultural heritage, as well as territorial capital [12].

The relationship between cultural heritage and territorial identity [12], in fact, is very close, as cultural heritage and all tangible and intangible assets positively influence local creativity thanks precisely to its very existence and aesthetic values, as well as the visual qualities of the heritage itself, lending itself to many interpretations and many meanings and variations according to the points of view adopted [6,12–17].

This same link should find in the “borghi” the ideal place to express the close relationship that unites the identity with the territorial capital, especially if the territorial capital is defined as a “localized set of common goods that produce collective benefits” [5]. Identity and territorial capital constitute, in fact, that set useful to the development of the competitive capacity of a territory [6] as they clarify both the irreproducibility of each place and their continuous transformation, especially in the “borghi”.

The stronger the connection is between identity and territorial capital, the more it will be possible to generate that process useful to enhance resources for tourism activities, and, not only that, but also for the growth of cultural heritage considered as a common good, creating relationality, a common sense of belonging, and the inclination to innovations, creativity, knowledge, coproduction, and cooperation for the constant and dynamic improvement of the local reality, influenced by local empowerment [12] and by the different global interferences [18]. This dynamism can also be expressed by the “presence of multiple territorial identities that render places more fluid, future-oriented, open-minded and able to change, positively influencing economic dynamics” [8], but still having a strong co-science and emotional ties between the inhabitants and their space.

In a study by [8], they identified similarity and solidarity as the determinants of identity: similarity defined as the similarity of physical/geographical status and living conditions, and solidarity as the coincidence and fusion of private interests with collective

ones, originating reciprocity and collective support. Again in the research, which in turn takes up a study developed by [8], it emerges how, in Italy, this identity spirit at the regional level is not very widespread, considering that only seven regions (Abruzzo, Basilicata, Puglia, Molise, Trentino Alto Adige, Tuscany, and Umbria) out of 20 have as their definition an inclusive cosmopolitanism. That is, that model of territorial identity thanks to which the inhabitants, in addition to physical resemblance, have an active and dynamic solidarity so as to be an open community without depriving themselves of their roots and belonging to local resources.

The same research shows that five regions (Calabria, Lazio, Liguria, Marche, and Sicily) out of 20 are characterized by individualistic localism, in which each regional community is united by physical, geographic, and institutional similarities, but solidarity is not practiced.

As has already been written, it is important to point out that territorial identity is dynamic and therefore moves from individual awareness and the collective sharing of experiences of place to channel them into activities and projects on the territory always in progress, avoiding an instrumental use.

The recovery of the “borghi” for tourism purposes, therefore, can be undertaken only if it forms a territorial identity capable of reviving an active and dynamic community, both to activate that sense of uniqueness of places, the genius loci, and the narrative of cultural heritage.

It should be noted, however, that to date, despite the Italian government’s so-called “recovery fund” plan and all the current measures useful to the development and economic growth of rural areas and the “borghi”, there are not enough economic and financial resources for the recovery of all the 5000 Italian “borghi”.

It appears, therefore, a priority to adopt a multilevel governance and a multiscale approach, in which territorial indicators play a key role in maintaining comparable information to detect the territorial diversity [19]. In this context, the “organizing principle” becomes “geo-geographically” relevant thanks to which we determine the positional, cultural, and functional relationships between biotic and abiotic elements in a “technical rationality” such as to be interpreted with a horizontal process. That is, the participatory and shared production of resources by all stakeholders using the most appropriate tools to finalize the efforts.

This organizing principle can be precisely that territorial identity in which, in addition to environmental, social, geographical, economic, infrastructural, and cultural factors, the values coming from the experience of each resident are included, an experience of which the cultural legacy and the Cultural Heritage are a part. Both of these latter factors (for a definition, see [10]) are a means to set up a reflective citizenship and a high sense of belonging that is achievable when an educational and training process is developed addressed to the younger generations, who will thus feel they are active participants in their own identity in sensory and cultural terms.

Building this consciousness in young people is essential to live in the territory as a space, in which each citizen becomes not a simple occupant of the space, but an occupant for that space, determined by the conditions offered not only in terms of geography and environment, but also by the historical, social, and cultural load that has configured it as such.

If each subject gives its own meaning to the space, it will be possible to transmit diversified narratives, during which the subjective elements are mixed with the objective ones. This narrative becomes, therefore, identity when the images and morphological, spatial, functional, aesthetic, and cultural traces are represented, no longer subjective, but objective, and thanks to which each component of the local community identifies itself.

Although territorial identity is mainly characterized by social factors (see the previous paragraph) as can be seen from the developed scheme, it is achieved when all the environmental, economic, and infrastructural elements become an experience belonging to the community. The theory of community-based tourism [20], in fact, is based on the sharing and the participation in the planning and programming choices of the tourism

product: the local community, thanks to spatial proximity, trust, and mutual interest, can easily create services and networks using not only natural, environmental, and cultural resources, but also human resources and the most appropriate technologies of the area. Solidarity and geographical, economic–social similarity are, in fact, the synthesis of the processes of territorialization, spatialization, and reification of the community towards space and society itself [3]. The tourist valorization can be effective only if all communities participate in this process for the finding of authenticity and the differentiation of tourist supply: Each local community has its history and its material and immaterial cultural heritage narrated with storytelling and becoming the tourist experience during the visit of the “borgo” [20]. The participation in the process of valorization from the local community to all private and public stakeholders in the coproduction of tourist products can affect the tourist experience and reduce the probability of exceeding the carrying capacity and the effect of demonstration: The residents pay attention to the external diseconomies (rumors, waste, pollution, and congestion) and create a sustainable tourism system, also as the tourist supply is direct to niche tourism [21]. This segmentation of demand is naturally formed, and for the hospitality system so that in the downtown of the borgo is not too countless and so the tourist flow is very interested to this territorial supply, avoids mass tourism. Therefore, in a lot of these “borghi” the tourist can visit and participate in many activities as such as: visiting equestrian centers and horse riding, winemaking, revived historical festivals, handmade pottery, and so on. However, all these activities are only tourist experiences when the residents tell the story and help the tourists to test these activities.

For this reason, the engagement of residents, above all in this moment when the territorial identity is so fragile from the depopulation and depletion, are very important to planning the tourist valorization through the coproduction, producing together tourism services from their conception to their implementation [22]. These sharing activities will be realized from all public and private stakeholders that develop a tourist system based on a new balance of local resources and by pursuing the following fundamental objectives for the sustainability of development:

- A “smart” growth policy, directed towards efficiency and appropriateness in the use of resources thanks to investments in the high-tech sector and innovation. A “borgo” can be a smart destination as a “an innovative space, accessible to everyone, and consolidated on a cutting-edge technological infrastructure that guarantees the sustainable development of territories, facilitates the integration and interaction of visitors with the environment, and increases the quality of their experiences at the destination as well as residents ‘quality of life’ [23] without destroying or changing the territorial identity or the cultural heritage, but finding a balance between all of these elements.
- An “inclusive” policy, characterized by the enhancement of local human capital, including those coming from peripheral internal and external areas, those who are economically disadvantaged, or those with special needs for integration.
- A policy aimed at the development of the “green economy” aimed at an appropriate use of resources through a proactive capacity of regions and cities that develop strategies to support the prevention and protection of the environment.

The development of the “borghi” for tourism purposes, therefore, requires the activation of a “continuous process of co-evolution between human society and environmental re-sources” [3], that “system of rules and attitudes related to local culture and history, aimed at achieving individual and collective goals” [18], and that social capital that enhances the economic and social integration. It is about acting on those “intangible elements, whose endowment presents a precondition for the valorization, management and transformation of external shocks into opportunities for internal development” [24].

Surely the latter alone cannot, as already noted [16,25], trigger those mechanisms of development, but requires the convergence of external policies, founded moreover on the centrality of the person [26] and the needs of the community, realizing inclusion as a model

of innovation “through a meaningful participation of the community and respect for the values it expresses” [14,27].

Finally, social innovation can be one of the main components of the transformation of the “borghi” into smart destinations for a sustainable tourism, thanks to technologically advanced solutions such as to respond to a tourism which, as defined by the World Tourism Organization, is “clean, green, ethical and quality at all levels of the service chain” [28–30], thus minimizing the use of natural resources.

### 3. Research Method

The path followed in the research has been descriptive, since its aim is the identification of certain results, following the study of reality [31–33].

The empirical research was divided into a desk phase in which documents and information were collected from websites and related to cases of “borghi” that have already undertaken paths of tourism development that have benefited local economies and a field phase in which in-depth interviews were administered to 11 key informants (KI) chosen from among academics, professionals, and experts on the evolutionary trajectories of the “borghi”.

The choice of this method is linked to the exploratory nature of the research objective. The intention was not to generalize the results, but to gain in-depth knowledge of a new phenomenon by accessing the perspectives of the interviewees, capturing their mental categories, interpretations, opinions, perceptions, and their reasons for their actions [27].

In the first phase, data were collected by combining documents and semi-structured interviews. Documents used for systematic evaluation as part of the study took a variety of forms, including background documents, brochures, journals, event programs, letters and memoranda, press communications, institutional reports, and information available on the websites of municipalities where revitalization projects were developed.

Among these documents, the main were:

- The “Charter of the Borghi”, in which the Italian Ministry of Tourism has included the “borghi” as a tool to renew the commitment to a sustainable development of the territories and is aimed primarily at the enhancement of the internal areas of the country.
- The “Save borghi” law, for the support and enhancement of small towns up to 5000 inhabitants. This law, starting from the need for an alliance between innovation, territorial cohesion, and beauty as the basis of the future of Italy, proposes a series of qualifying measures to lay the foundations of an economy more on a human scale that focuses on communities and territories, on the interweaving of tradition and innovation, old and new knowledge.
- The action of the “National Plan for Recovery and Resilience”, called “Tourism and Culture”, which contains a series of measures for the protection and enhancement of architecture and rural landscape and for the interventions of restoration and redevelopment of rural and historic buildings. In this sense, the Plan aims at a revival of small towns, largely abandoned, and saves the immense rural building heritage composed in Italy of huts, farms, farms, and stables at hydrogeological risk, creating the conditions for the revival of these small municipalities.

To these documents must be added the information provided on some generalist websites such as “I Borghi più belli d’Italia” (<https://borghipiubelliditalia.it/> (accessed on 18 May 2021)), the initiative created thanks to the contribution of the “Tourism Council of the National Association of Italian Municipalities (ANCI)” with the aim of enhancing the great heritage of history, art, culture, environment, and traditions present in small Italian towns that are, for the most part, marginalized by the flow of visitors and tourists and “Il borghista” (<https://www.ilborghista.it/> (accessed on 20 May 2021)), the portal dedicated to villages and tourists in villages.

Finally, there are the municipalities’ strategic planning charts that have implemented a set of policies and actions to enhance their “borghi”, contributing to the development of



tourism in the area. In particular, there are the strategic development plans of Civita di Bagnoregio (<https://www.comune.bagnoregio.vt.it/> (accessed on 20 May 2021)), that of Santo Stefano di Sessanio (<http://www.comunesantostefanodisessanio.aq.it/hh/index.php> (accessed on 20 May 2021)), Spello (<https://www.comune.spello.pg.it/> (accessed on 20 May 2021)), Recanati (<http://www.comune.recanati.mc.it/> (accessed on 20 May 2021)), Santa-Fiora (<http://www.comune.santafiora.gr.it/hh/index.php> (accessed on 20 May 2021)), and Buriano in the Municipality of Castiglione della Pescaia (<https://comune.castiglionedellapescaia.gr.it/> (accessed on 20 May 2021)).

Moreover, this information has been useful to design the interview guide, and researchers have analyzed the documents in order to obtain basic information and useful elements for the definition of the questions to be asked during the field research.

The second phase, carried out from February 2021 to March 2021, consisted of semi-structured interviews with 11 key informants:

- (1) The President of Cultura Italiae (Key Informant 1—KI1);
- (2) The Mayor of Lanusei (Key Informant 2—KI2);
- (3) A Village Innovation Manager (Key Informant 3—KI3);
- (4) An Expert on Digital Tourism Applications (Key Informant 4—KI4);
- (5) A University professor of economic geography with expertise in “borgo” development (Key Informant 5—KI5);
- (6) A journalist and author of essays on “borgo” regeneration (Key Informant 6—KI6);
- (7) The magazine director of “Italy’s Most Beautiful Villages” (Key Informant 7—KI7);
- (8) An agronomist expert on the recovery of internal areas (Key Informant 8—KI8);
- (9) A former Assessor of Tourism for the City of Syracuse, expert in territorial marketing (Key Informant 9—KI9);
- (10) An expert in tourism and cultural heritage enhancement (Key Informant 10—KI10);
- (11) A financial analyst, expert in the regeneration of “borghi” (Key Informant 11—KI11).

The interviewees were identified thanks to the contribution of the *Culturae Italiae* team of, a platform at the service of the country to offer a concrete support to the definition of a common and collective space of shared civic and social design commitment, whose aim is to develop and disseminate a cultural model, sustainable and competitive, able to promote a cultural change in the community and in public administration, governed by ethics and design intelligence.

From this platform has been generated a spin-off committed to the theme “Recupero borghi italiani”, in which academics, researchers, professionals, and experts involved in various capacities on the subject of the villages participate. These teams periodically discuss the social, cultural, practical, regulatory, economic, and visionary aspects of the recovery of Italian “borghi”.

A key feature of semi-structured interviews is that they provide in-depth information about a certain phenomenon covering various issues concerning the study. The informants were selected according to a theoretical sampling criterion [28], looking for the adequacy of the sample rather than its representativeness.

The interview aimed to collect opinions from different key informants in the recovery of Italian “borghi” and to identify shared criteria useful for the rebirth and enhancement of these little towns for the recovery of post-pandemic tourism in our country. Starting from this scope, as always happens in the application of this research method, it was also possible to verify the accuracy of the information in our possession and to obtain new information, to make the research project known and involve the interlocutor, and finally, to better define and build our project proposal [34].

In this regard, in the sample we have included participants who had an in-depth knowledge of the phenomenon of the villages, of the internal areas, and of the opportunities associated with the development of tourism.

The objective of the interview was to get the point of view of key informants on the role of the “borghi” in the Italian context for a new tourist offer and as an engine for the valorization of the internal areas of the country.

The preparation phase involved defining the interview outline consisting of 11 open-ended questions. However, it should be noted that the interview was a conversation provoked by the interviewer addressed to subjects chosen based on a survey plan with cognitive purposes guided by the interviewer on the basis of a flexible and non-standardized interview guide.

The interview outline included the following topics: the concept of villages; their role in the recovery of tourism; the possible tourism vocations of the “borghi” and the people interested in using them; the new tourism targets; the possible strategies and actions to be undertaken to revitalize the “borghi”; the tourism services to be implemented; the possibility of using recovery funds; accessibility and the use of new technologies; the threats, opportunities, strengths, and weaknesses of the Italian “borghi”; and finally, the contribution of the “borghi” to the development of the internal areas of the country.

In particular, the following is the scheme of questions:

1. Could you provide us your definition of “borgo”, emphasizing its main distinctive factors?
2. In your opinion, what could be the role of the “borgo” for the recovery of tourism?
3. What could be the tourist vocations and the people interested in using them?
4. What flows and typologies could a village or a network of connected “borghi” intercept?
5. What do you think are the strategies and actions to be put in place to revitalize the “borghi”?
6. What are the basic tourist services and systems that a “borgo” should offer?
7. The recovery fund has allocated 1.5 billion euros for rural areas; how can these funds best be used to enhance the value of “borghi”?
8. Do you have any ideas for accessibility-also to realize “tourism for all”-and internal mobility?
9. What is the role of application of new technologies (energy efficiency, telework, telemedicine, mobility, building renovation, home automation) for the recovery and development of “borghi”?
10. What are the strengths and weaknesses of Italian “borghi”? What are threats and opportunities for “borghi”?
11. The “Borghi” are often located in inland areas of the country, so how can they contribute to the systemic development of the entire area?

In addition, as part of the preparation, prior to submitting the interview, we documented the role and initiatives of the stakeholders.

Finally, an agenda of appointments was defined for the realization of the interview through the Google Meet platform.

In order to pursue data saturation: (1) the interviews were structured to facilitate asking the same questions of the participants; (2) we constructed a saturation grid, in which the main issues and topics related to the conceptual framework were listed on the vertical axis and the interviews were listed on the horizontal axis [35]; and (3) we relied on triangulation of data across multiple sources [36].

Finally, considering the authorization received from the interviewees, the interviews were recorded and then transcribed word for word, keeping the entire content unchanged.

#### 4. Results and Discussion

The authors should discuss the results and how they can be interpreted from the perspective of previous studies and of the working hypotheses. The findings and their implications should be discussed in the broadest context possible. Future research directions may also be highlighted.

The first part of the survey is focused on the concept of the “borghi” in order to understand whether the definition used by MIBACT could be considered exhaustive in the operation.

The Minister of Heritage and Culture and the Tourism Directive of 2 December 2016 n. 555 “2017—year of the Italian borghi”, in fact, considers the borghi “the Italian municipalities with a maximum of 5000 inhabitants characterized by a valuable cultural heritage, whose preservation and enhancement are factors of great importance for the Country System as they represent authenticity, uniqueness and beauty as distinctive elements of the Italian offer”.

A large part of the interviewees underlined how this definition, despite placing emphasis on distinctive factors of the “borghi”, such as valuable cultural heritage, authenticity, uniqueness, and beauty, should have emphasized the need for the human and social components, considered the basis of a community representative of the identity of these territories.

The territorial identity becomes substantial in the definition of the “borghi”, discriminating history and the distinctive feature of the “borgo” itself, placing it between past, present, and future, as a place of life and growth, activity and work.

The elements of landscape, already recalled in the European Landscape Convention, become characteristic of these “borghi”. Types of natural green elements and not and the methods and agronomic techniques consistent with the geographical and climatic characteristics are those that give the identity of that place.

In a prospective view, the dimensions to be included are tradition, customs, and traditions, as well as all the elements pertaining to the cultural identity of a historicized place, even if they are recent but historicized enough to make them “precious”.

The historical center becomes one with the surrounding heritage. This is the key to understanding, and the community is a fundamental part of it as it unites the historical territory to the innovative one, which is also expressed by new technologies and skills, as well as by the real needs of the “borgo” itself.

A place where tourism can be developed always with a view to safeguard the territory, understood in its human, historical, architectural, natural, landscape, cultural, social, and economic components.

*“The theme of ‘beauty’ must be accompanied by historical, cultural and landscape identity.” (KI2)*

In addition, in order to highlight the touristic value of the “borghi”, one should also consider their touristic vocation, measured by the presence of touristic services and a tourism offer system in the area.

Although in the definition there is the word “uniqueness”, it is not so clear what it actually means, since the “borghi” are heterogeneous depending mainly on their geographical location. This geographical aspect is not explained at all in the definition, while it represents a distinctive feature and is its origin.

From the interviews, it emerges that “borghi” can be anything but unique. There are “borghi” with a tourist value and “borghi” with other vocations. The municipalities that do not have tourist attraction resources should devote themselves to other vocations, for example industrial, agricultural, and activities not necessarily dedicated to the tourist aspect. In this way, special vocations should be enhanced.

*“The suburb is a cultural work, which lives of pluralisms.” (KI11)*

*“They are very heterogeneous entities, because there is a difference between ‘borgo’ and hamlet, because there is a difference between the neighboring hamlet and the hamlet of inland areas.” (KI5)*

The main limits of the definition provided by the MIBACT are found in the identification of a number (5000) of inhabitants that qualifies the village and in the identification of extremely subjective parameters.

*“The numerical aspect is certainly not a parameter that qualifies, it has only administrative, regulatory and legislative value.” (KI4)*

In any case, it must be said that definitions have a temporary value in the sense that they should be historicized, because they photograph a specific phenomenon in a specific historical moment.

*“Any definition should always be considered in relation to objectification with the identification of indisputable parameters.” (KI1)*

With respect to the theme of the role that the “borgo” can assume for tourism revival, the participants consider the “borgo” as a reality that grows from local sentiment, and tourism is only a decisive part of this, but one that was introduced later.

*“‘Borghi’ express great potential for relaunching tourism, but tourism cannot be the only economic sector to be relaunched.” (KI3)*

In this sense, a “borgo” has a strategic role in economic recovery and is a fundamental part of the process of systematically enhancing the country. Therefore, it is necessary to first make these places livable and improve their housing quality.

These municipalities form the Apennine ridge, and it is necessary to give them a voice since one of the main risks is the maintenance of the territory itself. It is essential to create the conditions that favour residency. The “borghi” must be repopulated in the genetic values that have formed them and that are those of the “culture of doing” linked to craftsmanship, agriculture, food, and wine.

Only then can we think of developing them in terms of tourism. After all, a tourist is nothing more than a temporary citizen and, as such, needs to live a visiting experience in line with the standards of the place he goes to.

*“On the other hand, tourism comes when the residents live well, not the other way around.” (KI10)*

In this historical moment, “borghi” for tourism take on a dual significance. They are, in fact, suitable places for proximity tourism, but also useful in this phase of coexistence with the COVID-19 pandemic.

At the same time, once this contingent situation has been overcome, it will be important to bring attention back to these small but valuable places, which have the possibility of distributing tourism flows more efficiently over time (seasonal adjustment) and space (decongestion).

Following the COVID-19 pandemic, tourism will be totally disrupted, both from the demand side and the supply side.

The “borghi” are destinations and factors of attraction for a more specific target. Therefore, in a scenario of conspicuous investment in infrastructure and greater sensitivity and entrepreneurial will, many “borghi” can be linked to tourism and enter fully into the world of hospitality.

*“Italy is an open-air museum made up of many small towns of great value and quality. Italy of the ‘borghi’ is a hidden Italy, different from the one that everyone in the world knows (Venice, Milan, Florence, Rome, Naples, etc.).” (KI7)*

In order for the “borgo” to assume a strategic role in tourism, it is essential to have a systemic vision of the overall dynamics of tourism itself. It is necessary to have an overall strategic approach that flows into a planning of what one wants to achieve over time.

The community that lives in the “borgo” is the engine of this valorization, since it represents the factor of attraction for a tailor-made tourism, not mass tourism, attracted by an innovative offer rooted in the authenticity of the territory and in the quality of life.

In this way, the “borgo” can become the “connection node” of a territorial matrix. The “borgo” is the point of consolidation of an experience that is made by passing through the territory.

*“Between ‘borghi’ and ‘borghi’ there is the journey, the narration, the transfer, the visit experience.” (KI8)*

It represents the part of the tourist experience that guarantees the connection between the practices of handcraft, agriculture, environmental components, food, etc. In this

context, even the architectural structures are functional to hospitality while also becoming an experience.

It would be desirable, therefore, to transmit to the traveler a predominantly human experience that makes the tourist breathe an atmosphere characterized by social relations, food, and handicrafts and not necessarily enjoy it in the form of prepackaged tours.

In the “borgo”, it is necessary to find elements that correspond to the lifestyle of the residents. In this way the “borgo” is alive and the tourist is triggered in a mechanism and in a place that is alive in itself.

From this, we understand how the “borghi” tourist vocations are linked to health, beauty, and well-being, but without neglecting the theme of hospitality.

It is a context that, in terms of visiting experience and methods of use, has strong peculiarities and is profoundly different from that of cities of art.

The “borghi” are not places suitable for hit-and-run tourism, but a slow tourism that allows you to enjoy, in addition to the artifacts, the beauty of the works and the landscape, the relationship with a welcoming community.

That of the “borghi” is a cultural tourism in which the human and relational dimensions play a priority role.

Starting from these, the subjects interested in enjoying them are transversal. The common characteristics are the interest in wanting to have an immersive experience and a close proximity.

They are ageless subjects, curious about history and nature, interested in the discovery of others and who, at the moment of the journey, intend, even temporarily, to reset their present condition and place themselves in a totally new condition.

*“Sportsmen, historians, food lovers. People ready for any discovery.” (KI8)*

In a traditional vision, the “borgo” is a place suitable for a walk-on target, the excursionist, who needs hospitality for a limited period.

However, there is also a definable “residential” target: tourism from an average stay of 6 to 10 days or, at different times of the year, residing intermittently, or even intending to move in permanently.

Both are targets that need to relax, and who benefit from open spaces in contact with nature.

Today, the pandemic period associated with the growth of remote work has generated new trends in demand, the so-called digital nomads. People that improve their productivity and enhance the quality of working life because they immerse themselves in different rhythms in more welcoming environments (see the farmhouse in a rural area). At the same time, it is possible to set up a space for co-working and co-living, therefore working in shared spaces (rationalizing costs).

In summary, the possible tourist targets attracted by the “borghi” can be:

- The classic tourist, that is to say visiting for 1–2 days, a maximum of 3 days. They are also defined as a comparative tourist or the excursionist, who stays for a limited time;
- Tourist of the roots, usually emigrant, who returns and stays every 3–6 months a year and who considers the “borgo” the place for his retirement, finding a quality of life superior to his daily life;
- Ageing people, who have more free time and a greater spending power. Although, for these, the appropriate conditions must be created to ensure inclusion and accessibility to avoid confining these people in places where sociability is limited to residents;
- Digital nomads, individuals who work in any location as long as they can use technology;
- young families with children of medium to high income; and
- Young people who have a very strong power of influence on others (they are the fashion bloggers or the influencers who set the trends) and are the forerunners. At this time they are the only ones traveling without too many safety problems.

Strategies to revitalize the “borghi” must start from two key words: convenience and culture.

The community must become aware that enhancing the value of the “borgo” is an opportunity for everyone, and this requires a profound cultural change.

Those who live in the “borgo” must understand culturally that visitors and tourists bring both economic and social wealth.

*“We need to think of the tourist as someone with whom to share these values.” (KI4)*

At the same time, it is essential to consider that the valorization of the “borghi” passes through a sustainable management of the so-called commons.

*“Common goods that must be managed as such and not be left to those who contribute to the creation of parasitic income situations.” (KI11)*

Therefore, there is a need to create an organizational and governance model that, in addition to being based on public–private collaboration, considers the community as an essential factor. A community that constitutes the humus of this revitalization that is the result of a combination of tradition and innovation, old and new, old and young.

*“The elderly who represent memory, the young who have the time and energy to develop the content of the elderly.” (KI8)*

Much of the interviewees emphasize the importance of a process in which the top-down path meets the bottom-up path.

The regional and municipal governments play a key role in the marketing of the “borghi” and, in addition to directing infrastructure investments, they can act as facilitators for those initiatives coming from “below” and from the community itself.

It is important that strategies from above, focused on facilities and the development of access infrastructures and transport, must be matched by strategies from below, contributing to the construction of a common territorial identity.

The logic to be triggered is that of a virtuous circle. If the municipal administration finds that there are a series of initiatives for the purchase of real estate and an attendance of the place, it can become an active part of the process. It can, in fact, sensitize the local population to understand the importance of this type of development and get them to take part in the initiatives of the “borgo”.

For example, in the form of community cooperatives: The healthy cooperative model can take charge of a vision and recovery of its own “borgo”. The basis of a hamlet’s development lies in collective planning.

*“It is essential to raise awareness towards groups of citizens who in a “passionate” way can dedicate themselves to the recovery of a ‘borgo’.” (KI5)*

The municipal administration must act as a driving force and, if smart, support the real estate regeneration and cogeneration project with a series of initiatives and service activities while also consulting territorial marketing agencies that bring foreign investors.

*“Making international agreements and then activating residents, who represent the trigger factor in this process.” (KI9)*

At the strategic level, the role of the central government should not be underestimated, as it can enable the “borgo” to function both as a “museum site”, as a cultural “resource of attraction”, and as a site with a cultural value, which, thanks to the dynamism of the activities carried out, can enhance the little-known areas of the country.

The development project must be set up and shared with the resident community. The population must be able and willing to accept the development project.

The process must be carefully constructed, with clear objectives and a long-term time horizon.

The actions to be put in place can be summarized in a few key words:

- accessibility
- digitization
- security

- training
- networking
- communication.

With regard to accessibility, digitization, and safety, these actions presume infrastructural interventions linked to investments to facilitate accessibility and internal mobility in these places, the installation of broadband, and the creation of medical care facilities.

Training is a key dimension of this development process. There is a need for a greater culture of hospitality. The latter must be thought of as an industry in the positive sense of the term. In this sense, the best practices of Matera or Grottole must be studied, in which there are real Academies of experiences.

*“The handcraft must be made to understand that if he were to tell anecdotes or would create a storytelling around the process of making certain products, this would increase the value of the tourist experience.” (KI4)*

The action of networking concerns the system of offerings in which the opportunity is created to network the “borghi”. On the contrary, individual realities will never be competitive. The single “borgo” is not enough for the area to become a tourist destination. A synthesis operation must be made, creating paths between the various “borghi”, and making it clear that Italy is a country of “borghi”.

In this sense, the “Cammini project” (Roads project) or the “Via Francigena” (Walking Route) represent cases of very successful networking. The return on image of these initiatives is very strong. What arises around them can be useful in revitalizing the knowledge of these territories. Further work could be done to network the “borghi” and create specific tours and slow tourism. This applies to both inland and coastal areas.

This would involve a more efficient distribution of resources and activities, but it would also profoundly change the dynamics of marketing, moving from the “borgo” to the “borghi”.

*“We are not thinking only of very fortunate, extremely well-known ‘borghi’. The question must focus on lesser-known realities and the effort is very strong if one wants to emerge in order to make the territory adequately known (see the case of Tropea).” (KI7)*

In addition, networking associated with digitization would make it possible to fortify the relational dimension and attract new tourism targets: workers who, in contact with nature and a pleasant environment, can benefit from these elements of diversity.

Communication is also an important action in which to invest. We refer to both territorial marketing aimed primarily at international players interested in investing in the “borghi”, increasing the appeal, and actions of tourism marketing directed to specific targets, both traditional and new.

In terms of tourist services, those interviewed emphasized that the system of tourism services that a “borgo” should be equipped with are, on the one hand, those essential to welcoming a visitor, and on the other, those necessary to support an experience that best characterizes that “borgo”.

The “borgo”, at this moment, has two needs: to strengthen the offer of services and to provide the possibility of carrying out activities without being in less comfortable situations. All of the actions aimed at increasing services so that they are on par with the services available in a large urban center are actions that go in the right direction.

It seems essential to create a combination of qualitatively homogeneous commodities, in which it is also possible to align or characterize the various services.

Tourists are always looking to combine the enjoyment of cultural resources and the rediscovery of natural itineraries, which are therefore the factors of a reality in which they are daily distant, with the availability of services that they can normally use.

From the point of view of “tourism for all”, it is necessary to foresee interventions to improve accessibility for the various targets of disabled people, studying solutions case by case.

*“For those coming from the city, it is necessary to create a sort of continuity of services: it is important to know that the tourist will be looking for services he uses daily and at the same time will benefit from the greater space available.” (KI4)*

For the purposes of tourism development, accommodation services are essential. At the same time, however, services aimed at making the potential and the peculiarities of the territory known are also indispensable. In this area, maintenance and management services of buildings should be provided, with specific reference to those dedicated to residential tourism.

Moreover, the “borghi” are often barycentric with respect to a whole series of events that take place in a wider range. Therefore, guides, experts, and professionals who accompany you in the fruition of the territory are extremely appreciated.

As already pointed out, connectivity services are also fundamental for development, but are equally important is the provision of services useful for creating specific itineraries, respecting time and permanence.

*“Ensure a balance between digital services and socialization and assistance services.” (KI5)*

Assuming that the inland areas have orographic problems, instability, an absence of health care networks, education, and recently, the growing need for adequate telecommunication networks, in view of the development of the “borghi”, the funds allocated by the recovery fund for the inland areas, in the opinion of our interviewees, could be used in the implementation of projects that can increase the appeal of the “borghi” to people who could contribute to the repopulation of these places.

*“Conditio sine qua non is an approach to planning that takes into account a systemic action between several municipalities that network.” (KI2)*

Funding, whether public or private, must be managed with a model of good business already thought of by local governments so as to give sustainability to the whole systemic action.

This presupposes a radical change from a definable perspective of requesting welfare to the entrepreneurial management of the “borgo”.

This would be the first step towards the productive revitalization of the “borghi” and the beginning of a process of sustainable development.

*“The only thing that would need to be accomplished is to make those areas fit for 2050.” (KI1)*

In line with these objectives, priority is given to interventions related to the hydrogeological structure to improve road networks and make accessibility and mobility possible, as the “borghi” are mainly located in the Apennines of the country.

Alongside these interventions, we should consider the investment in broadband, designed as a necessary condition for travelers.

*“Those who visit a place must be able to connect with it, if this does not happen that area will be penalized.” (KI4)*

This aspect should not be underestimated since the digital infrastructure for an inland area is totally different from that of an urban center. Technological equipment designed primarily for urban areas is not easily transferable, in terms of cost and infrastructure, to inland areas. It takes a lot of planning and structuring to make this transfer happen.

Part of the funds could be allocated to public–private partnership projects to strengthen the systems of supply and develop greater attractiveness at the international level.

The opportunity highlighted by some interviewees to direct funding towards the creation of schools is very interesting. Education in these areas could play a strategic role in outlining the future vocation of the territories. This applies to the entire educational pathway up to the post-diploma level: it would be interesting to be able to establish professional training schools of excellence, capable of attracting young people from all over the world.



*“Schools in inland areas must be different from schools in the cities. In the internal areas, it is necessary to teach people to know these territories and therefore to understand their advantages and potential.” (KI10)*

As highlighted several times in this discussion, certainly in the area of the “borghi”, a critical issue is that of accessibility.

On the one hand, the need to launch projects aimed at encouraging barrier-free tourism is highlighted. This, however, may encounter some obstacles.

For example, in the perspective of a philological architectural recovery, if on the one hand it might be possible to make the rooms of a historic building accessible, it would be difficult to install slides on period staircases. In this sense, digital technology, in particular through VR and AR solutions, could make the cultural resources present in a “borgo” accessible.

On the other hand, it should not be underestimated that isolation is in many cases an advantage. Therefore, it is necessary to enhance accessibility without affecting the beauty of the places and the elements that make them pristine in the eyes of tourists.

In the process of enhancing the value of the “borghi”, new technologies occupy a central position because, for many of those interviewed, they represent the asset that can speed up the development process and do so by generating multiplier effects.

The application of new technologies improves fruition in terms of services and activities and makes it possible to provide local residents with the same opportunities that residents of large urban centers have, eliminating discrimination.

Assuming that broadband is the basic infrastructure for using technological solutions, these solutions represent the cornerstone for supporting both technological and ecological transitions at the “borgo” level.

*“Technologies should be evaluated and considered primarily on the solutions they can provide.” (KI11)*

There are numerous technological applications in this sense: from electric mobility to sustainability in which there are new-generation vehicles equipped with sensors on board that can circulate in the entire area of the village, favoring capillary movements between locations (such as in the “borgo” of Lioni), telemedicine, and health care at a distance that reassures all elderly people, whether residents or tourists, passing by the energy efficiency of buildings.

*“A fascinating world opens up, where the ‘borghi’ find solutions that were unthinkable before.” (KI11)*

Technologies also increase the attractiveness of the area thanks to applications in tourism marketing and mainly in the use of social media.

In the final phase of this research work, the interviewees were asked to summarize, from their point of view, the threats and opportunities of the “borghi” and the possible strengths and weaknesses (see Table 1).

**Table 1.** The SWOT analysis of the “borghi”: some research results.

<i>Threats</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> <li>■ Excessive individualism (KI1)</li> <li>■ Risk of diverting funds to wrong investments (KI4)</li> <li>■ Socio-cultural and technological distance (KI5)</li> <li>■ Depopulation (KI5)</li> <li>■ Indifference to the public decision-maker (KI6)</li> <li>■ Excessive anthropization (KI7)</li> <li>■ Touristification (KI8)</li> <li>■ Imbalance between supply and demand (KI9)</li> <li>■ Ignorance and selfishness to hold annuity positions (KI11)</li> </ul>	<ul style="list-style-type: none"> <li>■ Growing attention towards “borghi” (KI1)</li> <li>■ Revitalization processes based on territorial identity (KI2)</li> <li>■ Rediscovery of cultural and social values (K/3)</li> <li>■ New travel behaviors and opportunities for remote working (KI4)</li> <li>■ Greater attention in the management of the trade-off between care and recovery of the territory and its enhancement (KI5, KI7)</li> <li>■ Pervasiveness of the principles of sustainability in tourism (KI8)</li> <li>■ Greater propensity to create public–private partnerships (KI8)</li> <li>■ Desire to enjoy a small dimension, which has always been appreciated (KI9)</li> <li>■ Attention towards technological and ecological transition (KI10)</li> <li>■ Diffusion of Community Cooperatives (KI11)</li> </ul>
<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> <li>■ Multiplicity of characterizations of the “borghi” (KI1)</li> <li>■ Presence of a unique cultural, material, and immaterial heritage (KI2, KI7)</li> <li>■ Attractiveness inherent in the “borgo” concept (KI3)</li> <li>■ Italian style and Made in as key factors in the tourism potential of our country (KI4)</li> <li>■ Possibility of enjoying a slow visit experience (KI5)</li> <li>■ Possibility of creating narratives (storytelling) differentiated according to the target of tourism (KI8)</li> <li>■ Hospitable atmosphere, in which it is possible to rediscover sociality (KI10)</li> </ul>	<ul style="list-style-type: none"> <li>■ Excessive provincialism (KI1)</li> <li>■ Processes of standardization in proposing and communicating the “borghi” (KI2)</li> <li>■ Inadequate promotion of inland areas (KI3)</li> <li>■ Lack of a culture of hospitality (KI4)</li> <li>■ Problems of seismic and health safety (KI7)</li> <li>■ Infrastructural deficiencies (KI9)</li> <li>■ Lack of adequate professional training (KI10)</li> </ul>

## 5. Conclusions and Further Research

The “borghi” are the hallmark of Italy, being spread mainly in inland areas and rural areas of the country, and are subject to the phenomenon of depopulation, demographic decline, aging of the population, and from an infrastructural point of view, strong degradation and abandonment.

The research paper contains conclusions that are developed on a twofold level. First—at the observational–interpretive level, starting from the theoretical background, the main aim was to provide a framework on the opportunities of tourism development in the are of the “borghi” and the opportunity to start a path of territorial sustainable growth.

At a second level—the regulatory level—the research could be of support and makes suggestions for some of the decisions of managers and policy makers in relation to the fashion and the conditions to be created to achieve this development.

In the first part, the research wanted to describe this scenario, while in the second part it shows how, for these “borghi”, the pandemic has been a great opportunity for rebirth and repopulation derived from the practice of both proximity tourism or domestic tourism in rural and inland areas, both for remote working, which has offered a great opportunity to people to leave the big cities and work from home in these places where you can enjoy a different lifestyle from metropolitan areas thanks to the possibility of being outdoors and the general welfare derived from the relationship with people for the immediacy of human relationships.

It has been shown that the pandemic, despite the economic and social crises that hit the domestic world, has brought a great opportunity for sustainable redevelopment in these places. This goal is clearly not easily achievable if the issue is not addressed from a theoretical point of view, with clear methods, criteria, and strategies to plan a development related to sustainability. To achieve this result, as it has been shown in this study, we must

start from the paradigm of territorial identity, enhancing for each “borgo” this aspect that becomes a factor of uniqueness, beauty, and authenticity. Territorial identity, in fact, is that element that unites the spatial character of the territory to its material and immaterial heritage as well as to its human dynamism. After outlining this criterion, especially for tourism purposes, each “borgo” will have its own dominant character with which to distinguish itself, but also be able to use the most abundant and usable resources of the territory and preserve the most fragile ones so that they become increasingly “smart” places; that is, attentive to the well-being of both residents and tourists.

This perspective emerged from the third part of the paper in which the empirical analysis was concentrated. In fact, thanks to the interviews of some stakeholders, important and interesting aspects have emerged that relate precisely to the future of the “borghi” and their possible tourist valorization in a sustainable vision. In fact, all the interviewees agree that it is necessary to have, especially for the tourist attractiveness, both a great technological push—in particular related to connectivity—and a new infrastructure where mobility—in particular the connections with the big urban hubs—and health and safety are the main assets on which to start the sustainable development of these places. These aspects are in fact attractors of certain tourist targets, which, as emerged from the research, can constitute not only a source of added value to the local economy, but also a major social driver that can help these “borghi” to be repopulated.

From this research, and above all, the interviews, it emerges that the valorization of the “borgo” is a very particular way to attract tourism flow because they do not attract mass tourism but a segmented tourist. For this reason, as the research explain, it is needs to rethink the tourist development of each “borgo”, in which, during the new planning of tourism, the residents and the public and private stakeholders can be involved in realizing a differentiated tourist supply. During this phase of planning tourist development, each stakeholder has a role in realizing the tourist attractions, based on the abundant and local resources and cultural Heritage that the local communities know very well. The residents can participate, in fact, in the organization of all tourist products, not only seeing the landscape but in realizing the tourist experience and the events. Therefore, each “borgo” is characterized and possesses a type of tourist demand: If we have a “borgo of water”, in which there a lot of waterfalls, this borgo will be visited by families; if a “borgo” is known for medieval festivals, the tourist demand is composed by adults and families with high education levels; or if a “borgo” is known for being the birthplace of musicians, the opera and classical music festivals are welcomed and the tourists demand is composed of musicians and music lovers, etc.; if a borgo is known for its arts festivals and because a painter or famous artist was born there, the demand is composed by artists and art lovers and so on. The development of tourism will allow for the attraction of not only tourists, but a lot of young people for working in direct and indirect tourist enterprises, and thus the added value spreads throughout the region, and not only locally. However, if the tourism product is sustainable, the cycle of tourist products is not applicable and it is possible when all “borghi” are united by networking, a route of “borghi” that allow the tourists to stay for more days or repeat the visit for getting to know the other “borghi”.

The research has highlighted that if the tourist development of the “borghi” is so addressed, the Italian gap between urban and rural areas can be significantly less than it is presently, but could totally disappear if infrastructures were built to interconnect territories not only digitally, but also physically through environmentally friendly mobility and sustainable infrastructure.

In conclusion, although the contribution has thoroughly analyzed the strengths, opportunities, weaknesses, and threats of the “borghi”, in view of the changes taking place, further research will be necessary to verify the state of growth and the local development of the “borghi”. To this end, a monitoring unit will be set up by the same authors that will verify the implementation of sustainable development for tourism in the “borghi”, including interviewing other stakeholders involved in this process.

The main limitations of this study concern the qualitative method. Qualitative interviews, in fact, suffer from a high degree of subjectivity and therefore cannot be formalized. The path of qualitative research is difficult to schematize, and its results are useful to deepen a particular phenomenon but are not generalizable.

Therefore, this research is likely to be only one of the first in-depth studies on this innovative and very current theme in a phase of recovery of tourism in which the experience required is of proximity, outdoor, adequately spaced, and in contact mainly with the nature and culture of the places. The research in this sense opens the way for several other insights. First of all, the opportunity to expand the number of interviewees and then go on to organize a quantitative study through a survey of both “borghi” tourists and also of tourist players that operate in the tourism offer system of these small towns.

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Article

# Golf: Is It a New Form of Sustainable Tourism or a Violation of Traditional Rural Vocations? Italy and Brazil: Comparison between Two Case Studies

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**Abstract:** The present research work analyzes the path of territorial reconfiguration that has led to the new uses of agricultural land. In particular, the analysis focuses on the conflict of use between agriculture and sport. Is the sporting practice of golf a new form of sustainable tourism or a violation of traditional rural vocations? The paper compares two case studies in Italy and Brazil to try to answer the aforementioned research question. The two cases under study represent a conflict of land use between the hypothesis of persevering solely agricultural activity and the possibility of introducing new activities. Often, however, agriculture as the only activity practiced by a population is not enough to ensure a sufficient income; it is therefore necessary to diversify economic activities. As will be seen in the text, this does not mean a total abandonment of the primary activity in favor of other land uses apparently in contrast with it.

**Keywords:** sustainability; sport; tourism; local development



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## 1. New Ways of Tourism and New Forms of the Touristic Use of Places: Interpretative Features

Sustainable tourism, slow tourism, quality tourism, responsible and ethical tourism are all expressions that, although today are in some circumstances rather abused, refer to and imply the use of non-“traditional” forms of tourism. In other words, a tourism that intends to experience natural and cultural resources (material and immaterial) in a fair and coherent way; which intends to give priority to the places, with their own unique characteristics, their own traditions, their own pace of daily life, enhancing the value of local identities. In this sense, tourism can be defined as “slow,” because if it is true that the territories are slow—responding to some intrinsic characteristics that refer to the concepts of uniqueness, typicality, authenticity—it is also true that “slow” is mainly the behaviour of the tourists themselves; that is to say that what changes is essentially the touristic choices that are clearly stated. The philosophy behind this new way of tourism aims to redefine the concepts of time, productivity, and efficiency, respecting the person and the environment [1] (p. 118). It is a way of using tourism that, not coinciding with a mass offer, is linked to the territory in terms of landscape, culture, and anthropic capital. Not only that, this innovative form of tourism of the territories also plays a significant role in the local communities with which the tourist intends to establish a more or less strong contact, from which they can create new opportunities for economic development for the territorial context and its inhabitants [1]. The communities, therefore, become an active part of the touristic experience in the sense that the touristic success of their territory will certainly derive from the attractiveness that it is able to exercise, but also, and

above all, by the propensity of people to internalize tourism, making it an integral part of their quality of life [2]. It is a question of favoring the value of territorial differences and local characteristics and favoring the identity processes of local societies. This is a new form of touristic practices oriented to environmental sustainability and not only a holistic sustainability, responsibility, and ethics: they “are interested in deepening their knowledge, in discovering the specific characteristics of a given territory and the people who built their history on it, empathic involvement with the way of life and with the structure of social relations typical of that specific reality” [3] (p. 36). Being a positive response to the negative effects of massification, sustainable tourism “has been defined as a tourism that meets the needs of visitors, host communities, the environment and industry, taking into account its current and future economic, social and environmental impacts (UN World Tourism Organization 2005)” [1] (p. 118). If this touristic “practice” favors behaviors aimed at the acquisition of physical well-being, as well as the knowledge of the places and the ability to relate to the territory and its stakeholders while respecting territorial contexts and environment, sports tourism can be traced back to using tourism of the territories, provided it is implemented according to the parameters related to the paradigm of sustainability. At the base of the tourism project, there are sports that are not an accessory, instead they characterize journey, travel and the choice of touristic destinations. Whatever product sports tourism takes on—entertainment, action or culture—it can generate benefits and repercussions at a territorial level in economic, social and cultural terms (promoting well-being, job opportunities, synergies with local communities, etc.) and, when this happens, sports tourism is linked to a broader meaning of sustainability. It is certainly a complex phenomenon characterized by different aspects that are not easy to trace back to a single definition and a single concept. Grumo and Ivona argue that “The sporting experience is the fundamental and characteristic element of sports tourism” [4] (p. 54). At the same time, we can understand it, along the lines of Hall [5,6], as a journey for “non-commercial” purposes with the ultimate aim of participating—active or not—in sporting events outside one’s residence; many other definitions always refer to the idea of a physical activity practiced personally or as a spectator [7–9]. However, the combination of sports tourism and sustainability does not always exist and, therefore, we cannot always attribute this tourism segment to that experience of “quality” tourism, of which we have already stressed the fundamental aspects that favor the relationship with the places and the environment. This is especially true when considering the possibility of building a relationship with the local population and a link with the anthropized spaces.

These are the requirements for analyzing golf as a sporting phenomenon in Italy and Brazil, highlight its main characteristics and dynamics in an attempt to understand whether this sport is compatible with the principles of sustainability and, therefore, respectful of the environment, ecosystems and local cultures. It is also to determine, as many protest movements point out, whether golf solicits property transactions and often speculative, environmental issues related to the excessive use of water that is necessary for the maintenance of the structure, running the risk of salinization of the groundwater in coastal areas and possible pollution from pesticides. “Other reasons for strong opposition are the potential dangers in areas of high naturalistic value (woods, forests, lakes and wetlands) and the conflict with existing economic activities (agriculture and livestock in particular)” [10].

In the event that it emerges, however, when looking significantly at the standards of eco-sustainability (provided that this is possible), both in managing the design of existing and new golf courses (limiting water consumption, soil, cubature), it is legitimate to ask whether golf tourism can effectively contribute to the development and promotion of territories, safeguarding them and accepting the idea that the environment must be understood exclusively as a resource to be exploited with a view of containing environmental debt. As a matter of fact, today everything is played at a “glocal” level around the concept of ecological transition: a challenge certainly necessary to embrace a strategic vision focused on sustainability and sustainable ecology.

In order to investigate the phenomenon of golf in the two countries examined, and in an attempt, above all, to understand the sustainability of this practice in relation to tourism, this work has embraced a qualitative-quantitative methodology with integrated scales and sources from the national to the regional and local levels. A plurality and integration of scales is necessary to problematize the issue and describe the main planning programs and strategies in relation to the response of the territories. In this sense, the empirical analysis was oriented towards understanding to what extent golf tourism can really be respectful of places, their identities and vocations. Using desk analysis and field surveys, combining quantitative data (statistics on golf in Italy, in Apulia and in the golf resorts in the State of Rio de Janeiro and in Teresópolis as well as in Brazil) with the qualitative aspect (listening to the main stakeholders and the population), it was possible to describe the transformations of the territories and get to know what the innovations in the field of golf tourism are compared to the analysis of policies and planning tools at a national and regional level.

## 2. Eco-Sustainable Tourism and Golf in Italy

Golf is one of the sports activities that best demonstrate the close synergy between tourism and sport. In recent years, golf and tourism activities, strictly speaking, have seen a steady increase both at a European and world level. The flows of “golf tourism” are gradually increasing, especially in areas that host golf facilities with a landscape-background of high cultural and natural value. Regions such as Sicily and Apulia in Italy and the Algarve in Portugal or Andalusia in Spain have seen a marked increase in tourist-golfers who move from the northern countries in search of more pleasant destinations and milder climates [4]. However, with the appropriate diversity these regions are developing tourist routes that synthesize purely sporting needs with those of visiting the places. The expected result is the expansion of potential tourist demand and the attractiveness of places not only limited to the summer period. In other words, sports tourists can be motivated mainly by sport or travel. As far as we have been able to record so far, the most requested golf facilities are those located at a relative distance from culturally and landscape-relevant cities; this helps to strengthen the belief that the profitable combination of golf and tourism is far from being achieved. Therefore, it will be increasingly necessary to integrate collaboration between public and private bodies in the design and promotion of a diversified touristic offering that can integrate golf infrastructures with territorial characteristics. The need for environmental protection should also lead both of these bodies to a design that is attentive to the needs of the territories concerned. In line with the recent trend that has decreed that tourism be increasingly aware and oriented to the protection of territories, even the golf tourist seems interested in combining the vacation spot for sports purposes with the knowledge of the destinations reached. Golf tourism, as a matter of fact, is carried out at any time of the year, avoids the destinations typical of the massification of tourism and is strongly driven not only by the quality and diversification of golf courses (moreover related to different environments) but also by the cultural and social diversification of the target regions. Italy, acknowledging the trends described and the delay in its policies, is outlining new strategies. An example is the Strategic Plan for the development of tourism in Italy “Turismo Italia 2020. Leadership, Lavoro, Sud,” according to which the combination of golf and tourism must be part of the strategies of Italian tourism promotion in the coming years. Alongside the more traditional products of the sector (sea, mountain, art cities), a number of important segments of demand defined on the basis of specific interests and needs are emerging. Golf tourism in Western Europe generates a market of 3.6 billion euros, of which Italy intercepts, however, only 7%. The cost of international tourist-golfers for golf courses in Italy is equal to an eighth of that of Portugal. The reasons for this weakness in a sector that is certainly interesting for the appropriate per capita expense depends on the low number of golf courses compared to the main European competitors, their poor diffusion on the territory (mainly in the South, where it would be necessary to develop diversified and integrated products as mentioned



above) and the lack of integration and collaboration in the management of golf courses. For these reasons, the development of the activity of golf in a number of facilities and players has attracted the attention of the public regarding the repercussions on the territory from the construction and management of golf courses, especially when the golf course is located in particularly sensitive areas.

Golfing in Italy dates back to 1903 with the foundation of the Circolo Golf in Rome. Over a century later there are 386 clubs (of which 280 clubs are tout court and 136 are practice fields) with just over 90,000 members, and an increasing number of players and golf facilities (Figures 1 and 2). The regions with the largest number of fields are Lombardy with 23,700 members (Figure 3), Piedmont, Veneto, Lazio and Emilia-Romagna, then other regions. There are no golf courses in Molise and Calabria, only clubs (with 266 members in total) [11].

Even more marked is the increase from the point of view of the members. Sure enough, in the same period of time the number of memberships increased from 1220 to about 100,000, an increase of more than 80 times the initial number.

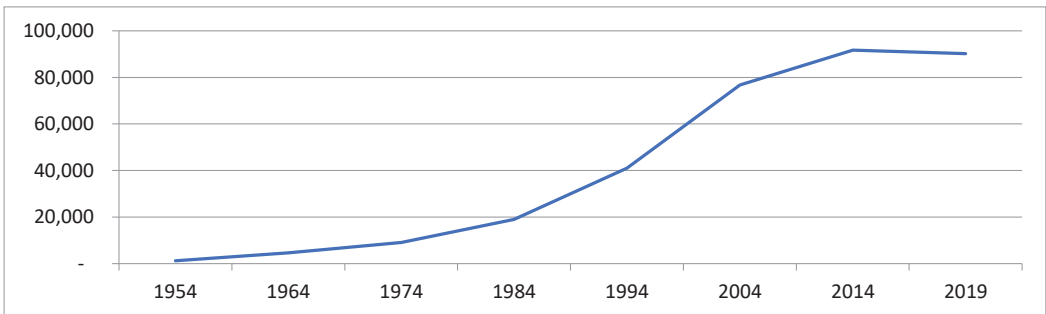


Figure 1. Progression in the number of golfers registered in Italy from 1954 to 2019. Source: authors’ processing based on FIG data [11].

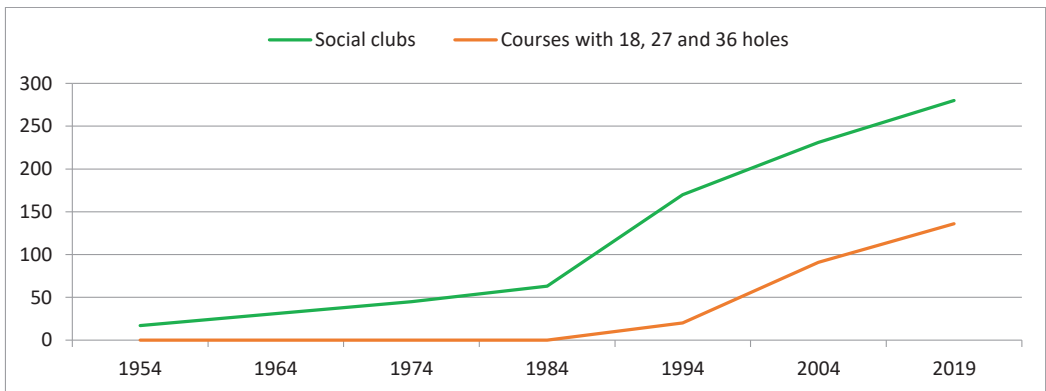
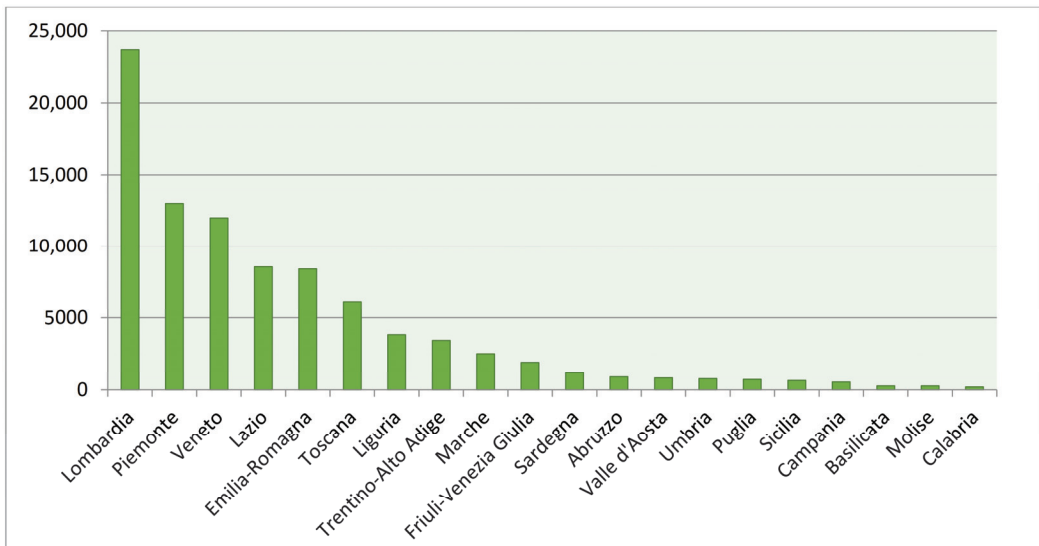


Figure 2. Progression in the number of golf clubs and golf courses in Italy from 1954 to 2019. Source: authors’ processing based on FIG data [11].



**Figure 3.** Distribution of golfers registered in the Italian regions in 2019. Source: authors' processing based on FIG data [11].

Although Italy cannot be counted among the main destinations for golf tourism, it has, however, all the potentiality of becoming one in the future. Further localizations of golf courses in the South of Italy would strengthen the union between sport and tourism in an area with very large potentiality given its physical and anthropogenic characteristics.

From many places and for many years the approval of the National Golf Law would regulate the rules for the construction of new facilities, especially in regions such as Calabria and Molise that although being without had great potential in attracting golf tourists. For example, the Ryder cup will be held for the first time in Italy in 2023. This will be a great opportunity for the affirmation of golf and tourism in Italy.

If on the one hand the flow of golfing tourists hopes to increase with the consequent multiplier effect of the local economy, on the other hand, careful consideration should be given to the diseconomies of the territories in terms of land and water consumption. Each 18-hole course occupies an average of fifty/sixty hectares (it is estimated that in Europe over 300,000 hectares of land are used for golf courses). The risk is that behind a project of golf structures mere financial speculation can be hidden. Furthermore, the maintenance of existing courses requires a massive consumption of water and often this conflicts with other civil uses, such as salinization of the groundwater in coastal areas. In addition, careful regional planning must take into account the landscape, especially in the presence of areas of high naturalistic value and a possible conflict of land use with other economic activities such as agriculture and livestock farming. Therefore, an appropriate national law framework on golf could and should harmonize regional autonomous legislation.

### 3. Towards a New Form of Sustainable Sports Tourism: The Case of Apulia

According to Pigeassou [8], sports tourism is a destination chosen so tourists can participate in characteristic sports culture phenomena, conceived as an expression of physical activity and/or cultural events. Therefore, according to the author, sports tourism is an autonomous type of tourism that combines tourist and cultural experiences in the field of sport. Pitts [12] then highlighted how, in essence, sport has introduced a new management perspective on the market, distinguishing sports tourism into two categories: participatory tourism (travel for the purpose of participating in sporting activities) and entertainment (travel for the purpose of entertainment including sports, recreation, events, etc.).

In recent years there has been a change in the relationship between the participants, increases in demand, spread and diversification of infrastructure, and by the multiplication of forms and opportunities for practice. All this has raised the perception of the social and economic importance of sport, triggering commercialisation of segmentation not only of the market but also of the supply, a process of specialization and professionalization of the operators and organizations of the sector.

On the demand side, there are three different types of sports tourism [7] which concern the degree of involvement of the tourist and the motivation for the trip. In the first type, active sports tourism, the reason for the trip is sports; in the second, events, the motivation is participation; the last type is that of nostalgia, where the sports tourist travels to admire. They differ in the manner of participation and in the underlying motivations but they interact with each other.

On the sports tourism side, authors Zauhar and Kurtzman [13] identified five macro areas: attractions, resorts, cruises, organized tour packages and events. These are areas that offer tourists things to observe and do related to sport. For example, sports can be natural (parks, mountains) or artificially constructed by man (stadiums, museums). Sports resorts are very large complexes that have a high standard of services, offer different types of sports activities at various levels, offer the presence of highly experienced and renowned instructors, and it is all organized and assembled in all-inclusive packages. The category of cruises includes, on the other hand, all voyages made with ships and boats that combine sports and/or sporting activities as a main market strategy. In the panorama of organized tourism there are many proposals for travel, including both short or long stays that have sports as their main theme and that manage to move millions of tourists around the world to their favourite destinations, sports facilities or events. Golf in Apulia is relatively recent; the first 18-hole golf course was built in Castellaneta (Taranto) in 1968 in an area overlooking the sea already intended to host a luxurious resort. Subsequently, in 1996 the Malopra practice course was built, a pioneering initiative south of Lecce. A year later (1997) Barialto Golf Club was completed with 18 holes in Casamassima, near Bari. In the nineties it was thought that golf could enhance an area in the Municipality of Vernole (Lecce) that would become a golfing reality with the birth of the Acaya Golf Club (2009, 18 holes). The latest facilities are the San Domenico Golf Club, finished in 2001 with 18 holes, and the Golf Club Torre Coccaro (2006, nine holes), both in Savalletri di Fasano (Brindisi) [4], about 1 km from each other. In total, there are ten golf courses in Apulia, seven of which are affiliated with the Italian Golf Federation and the others are aggregated as practice courses and for sports promotion. The number of members is 720 (2019 data), slightly decreased compared to the increasing trend of recent years.

Among the infrastructure for touristic activities, golf courses have a strong impact on the surrounding environment. The consumption of resources (for example, the extraction of water, the occupation of soil, etc.) and the pollution produced, for example from the use of pesticides, are of major concern. As a result, the Italian golf movement is increasingly directing its development towards an environmentally friendly approach through environmental certifications or acknowledgements. Golf courses require a huge amount of water every day and, as with other causes of excessive extraction, this can result in a water deficit [14]. Golf resorts are increasingly located in protected areas or in areas where resources are limited, further intensifying the pressure generated. This awareness has led the Italian Golf Federation to sensitize its members to environmental issues with increasing initiatives. For example, one of the most effective is the Environmental Certification of the Golf Environment Organisation (GEO) which can be considered a sort of environmental balance for golf. The objective of the GEO certification is to ensure that the environmental commitment undertaken by a golf course is recognized, rewarded and disclosed. Among other initiatives in raising awareness about environmental issues, the FIG has paid attention to the cultural heritage that exists on the perimeter of the fields, saving water consumption (through routes that use macro-thermal species that are more suitable for hot-arid climates, with water scarcity, and more resistant to water stress and wear), and the construction

of golf courses designed and managed according to the principles of eco-sustainability. Eco-sustainability, therefore, has a potentially considerable function in environmental protection and reconstruction becoming an integral part of land use planning and local environmental policies.

In Apulia, the San Domenico Golf Club obtained the GEO certification in 2019 and obtained the recognition of a club engaged in the conservation and protection of cultural heritage (a Messapian necropolis of the fifth century B.C. and a Masseria (large farm) of the eighteenth century) in 2017. The latter recognition was awarded in the same year to the Golf Club of Acaya (Caves of Basilian monks dating back to the fourth century AD) along with one for saving water consumption. There are also four Golf Clubs in Apulia that currently use macro-thermic species: Barialto di Bari, Acaya, Torre Coccaro and San Domenico. The latter two clubs, which are the subject of this discussion, both belong to an area known as the “productive agricultural park” and the “agricultural area of environmental protection” (Figure 4).



Figure 4. The location of the Torre Coccaro Golf Club and San Domenico Golf Club. Source: authors’ processing based on IGM Charter of Italy 1: 25,000.

Referring to the Regional Landscape Plan of Apulia, the two golf centres have two fortified large farms from their original housing units which fall into areas of considerable concern for the landscape. In fact, the whole area is included in the perimeter of the rural landscapes, with particular reference to the Multifunctional Agricultural Park of Enhancement of Monumental Olive Trees. In this area, you can distinguish two predominant rural landscapes: the centuries-old olive groves and the landscape of the blades,

episodic watercourses, which interrupt the peri-coastal agricultural territory at irregular intervals. There are two morphotypes of the blade landscapes, the agricultural mosaic associated with elements of naturalness (arable land/wooden arable land associated with olive groves/woods, arable land/woods and pasture) and the arable land associated with the olive groves. The prevailing crops are, therefore, the simple arable land in non-irrigated areas and the olive groves. The area is subject to landscape protection and almost entirely surrounds the archaeological site of Egnazia, among the most important in the region. The historical environmental context is, therefore, characterized by the presence of monumental olive trees and large fortified farms that accentuate, as further landscape resources, the touristic vocation of the entire area.

Both structures fall, therefore, into an area of prevalent and historically agricultural use. The structure of the G.C. Torre Coccaro is complementary to the ancient large farm Torre Maizza, transformed in 2002 into a luxury hotel. Over the centuries, Torre Maizza was a fortress in the line of defense that crossed the Apulian region, a fortified watchtower of the sixteenth century, against the incursions of Ottoman Turks and Saracens and a place of refuge for pilgrims during the invasions. A symbol of protection and safe haven for many years, Torre Maizza has slowly evolved into a large farm with the succession of generations. Now it is a five star luxury resort immersed in the plain of ancient olive trees with adjoining stables of cows, sheep stables, an oil mill on the ground floor, fortified orange groves and a fortified vegetable garden. After a long period of abandonment, it was purchased in the early 2000s by a family of local entrepreneurs in the tourist accommodation sector. Since 2018 the management (with a thirty-year contract) has been taken over by a chain of English luxury hotels. At present, the agricultural activity carried out in the land belonging to the structure, although evidently not representing the heart of the business of the hotel group, is in full swing. The manager of the same group has confirmed on several occasions that it is precisely this agricultural landscape that was the real *vis attractiva* (attraction) of the entire investment (over EUR 6 million). The total area of the structure is about twenty hectares; the golf course occupies about twelve. The total number of full-time employees is about 80 and a tenth are dedicated to the golf club.

The San Domenico Golf Club is located a short distance from Borgo Egnazia in Savelletri di Fasano. The inside of the Masseria Cimino, of the eighteenth century, is considered the guesthouse of the field. These properties are part of the San Domenico Hotels group. The main nucleus of the Masseria San Domenico dates back to the fifteenth century and consists of a watchtower belonging to the Knights of Malta who had their main base in Apulia in the nearby port of St. Stephen. The tower, still intact, stands at the centre of the residential area that was gradually transformed until the eighteenth century, becoming one of the most important fortified farms in the area. A family originally from Fasano owned and used it sporadically in the summer for many years. The management was entrusted to a farmer who lived there throughout the year and was responsible for the conservation and the harvest of 100 hectares of surrounding land, consisting of orchards and mostly olive groves. In 1996, the owners decided to return to Apulia and turn it into a luxury hotel; seven years later followed the golf club not far from the hotel, which covers about 60 hectares. As can be seen, agriculture is not the predominant activity of the San Domenico Group, but it is still one of the support activities managed by a special agricultural and forestry company with its employees.

Compared to the conditions that existed before the construction of the two golf courses, it can certainly be said that they have contributed to the overall development of the land on which they stand and with positive effects on a local scale. As previously seen, in terms of direct employment the numbers are rather low, but the presence of this sport has generated considerable flows of tourists to the Apulian territory. After all, sports have taken a leading role in our society, both for the economic flows linked to it and for the many environmental changes produced, which can be highly pervasive [15]. It is sufficient to recall, for example, the remarkable urban transformations of cities and all the venues of medium and large sports events. For several years golf has been fought against by the

associations of environmentalists. It is not a sport that is in close contact with nature, as fans have always argued, but an activity that has a negative impact on the territory, with artificial landscapes, deforestation actions and introduction of plant species not consistent or even in conflict with the local ecosystem [15,16]. In the two case studies, this is partially true because the construction of the golf courses has, at the same time, caused the owners to undertake a path of overall environmental quality. It remains an objective fact, however, that in different parts of Italy several hectares of agricultural land have been lost and used for golf courses and the change in the use of agricultural areas “has often been converted into a distortion of the landscape and environmental structures of the areas” [16] (79).

#### 4. New Sustainable (Eco) Tourism Strategies in Brazil

Over the past few years, the tourism sector has assumed a role of a certain importance within the Brazilian economy; despite the fact that the international tourism movement has gone through alternating phases, since the 1980s it has nevertheless shown an almost positive trend. In fact, recently (2016), the direct participation of tourism in the economy reached \$56.8 billion, or 3.2% of GDP. The sector’s total contribution was \$152.2 billion, 8.5% of GDP. The World Travel and Tourism Council (WTTC) estimates a 3.3% growth in the tourism sector until 2027, reaching 9.1% of GDP [17]. In relation to international demand, tourist arrivals in the country have not changed substantially from previous years, but have reached the highest level ever recorded: 6.57 million arrivals in 2016. Argentina is the largest issuer of international tourists to Brazil, followed by the United States, accounting for 34.9% and 8.7% of total tourists in 2016, respectively. When assessing the number of arrivals by continent, South America accounted for more than half of the total volume of foreign tourists in 2016 (56.75%). Europe, with 24.42%, and North America, with 11.17%, are the other two continents that show significant participation in the Brazilian tourism sector.

Greater attention began to spread in Brazil, on a political and speculative level, towards issues related to the concept of sustainability in relation to touristic activities, although not always in a substantial and continuous way, mainly influenced by “alternating” political decisions and by the change of governments. As rightly pointed out by Varani and Moscatelli, the need to finance sustainable touristic activities “supported” within different projects is clear (for example, Proecotour is a tourism development program aimed at eco-sustainable activities, activated with the Banco Interamericano de Desenvolvimento (BID), under the direction of the Ministry of the Environment for the Amazons and Pantanal); on the other, the Brazilian government is also a supporter—as widely known—of programs with a strong environmental impact, especially to the advantage of the speculations implemented by multinationals [18]. In this latter case, we need only think of the aggression against the Amazon forest, whose deforestation and logging are aimed at extensive soya cultivation and grazing. This practice has increased especially since the Bolsonaro government’s policy.

Tourism that is known as a sector that respects the environment, culture, society and local economies is above all a bottom-up policy: “communities and NGOs now feel the need to claim the right to sustainability and to enjoy the positive implications that tourism can potentially have, thus not only referring to respect for the environment, but also to an economic return for the local population. Sustainable tourism is therefore a fundamental tool for enhancing local culture” [18] (p. 701). In other words, the intention is to put the people at the center of attention and, consequently, to activate participatory processes to ensure that the communities are not passive subjects, but protagonists of the tourist offer; prerogatives recognized as necessary for making Brazilian tourism a community and solidarity-based activity. This is the case of the “Projecto bagagem” Association, founded in 2002 with the aim of creating a network for solidarity and community-based tourism. “The association developed a partnership with various NGOs in Brazil, developing community-based tourism packages that would have a positive impact on the local population and, at the same time, be able to offer conscious tourists a real experience in contact with the living conditions, rhythms and culture of the place. In order to implement these projects,

training programmes for communities have also been devised so that they can manage tourism" [18] (p. 701).

The need to support new forms of tourism based on responsibility and in tune with the needs of local populations is therefore becoming increasingly evident. While this new trend is fairly widespread in civil society, it is less firmly established in the policies of the Brazilian government. Nevertheless, there is a consensus on the idea that tourism, with its various segments (including ecotourism and sustainable tourism), can represent an opportunity for the country's development with a view of creating new jobs, reducing inequalities and protecting the territory.

The Ministry of Tourism (Mitur) presented four national tourism plans: the "National Tourism Plan (2003–2007): Guidelines, objectives and programs"; the "National Tourism Plan (2007–2010): A journey of inclusion"; the "National Tourism Plan: Tourism does much more for Brazil (2013–2016)", and the last, the "National Tourism Plan (2018–2022): More jobs and income for Brazil". Particularly, starting with the 2007–2010 plan, these plans lay the foundations for a more socially inclusive policy and emphasize the need to encourage domestic tourism, while recognizing the importance of international flows. Above all, however, the idea of paying greater attention to cultural and regional diversity is beginning to emerge, thus facilitating the launch of new tourism and new tourist destinations that are far from the traditional circuits, while also spatially redistributing the benefits deriving from touristic activities. Diversification also means including a range of options along with the possibility of "experiencing" the culture and traditions of the host communities in the tourism offering.

The latest National Tourism Plan (NTP 2018–2022) has set as a programmed objective to modernize and reduce bureaucracy in the tourism sector in an attempt to expand investment and facilitate accessing credit to stimulate competitiveness and innovation. This involves investing in the promotion of Brazilian tourist destinations not only on a national but also on an international scale, and also by promoting greater professional qualifications for operators and strengthening decentralized management and regionalization processes in tourism. In 2017 the Ministry of Tourism promoted a program called "Brazil + Tourism," with the aim of strengthening and making tourism an important driving force for the development of the territory. The objectives to be achieved by 2022, included in the same program, consist of improving the strategies and initiatives to be implemented and shared in the latest National Tourism Plan (NTP). The general objectives of the NTP are to strengthen regionalization; to improve quality and competitiveness; to innovate; and to promote sustainability (the latter objective was also supported in previous plans). The aim is to raise the level of Brazilian tourism and consolidate it as an important player in the national economy, together with the implementing coordination between the different levels of government: federal, state and municipal [19]. This aspect goes in the direction of strengthening an alternative approach to tourism management, emphasizing the need to promote decentralized processes of participation and decision-making. The introduction of the concept of "regionalization" implies the necessary creation of a regional tourism network capable of extending economic and social benefits, not only to the municipality with a clear vocation for tourism but also to all those municipalities that orbit the regional network.

Another aspect dealt with in the framework of the latest Tourism Development Plan concerns—as aforementioned—the sustainability and the implementation of sustainable tourism. Promoting the development of sustainable tourism has always been a concern in national tourism plans. In particular, the three-year period of 2013–2016 was an important period to strengthen the agenda of inclusion and sustainability in tourism. The United Nations Agenda 2030 refers to the need for sustainability to penetrate the guidelines of the tourism policy, considering the environment, culture, society and the economy, in total harmony with the concept of sustainable development, at all levels: state, federal, regional and municipal. The desired objective of embracing sustainable tourism includes the idea of the necessary adoption of tourism that is above all "responsible," including issues ranging

from ethics to social responsibility, to the protection of children's rights, to respect for the environment and the maintenance and enhancement of local cultures, as well as to a greater participation of the destined communities in defining development policies and access to this economic sector. All this involves the adoption of sustainable practices to promote the integration of local production in the tourism sector and the development of local tourism; to allow democratic access to segments of special demand for tourism; and to encourage an ethical approach to tourism.

Furthermore, since the second segment chosen by foreign tourists in Brazil is ecotourism (about 16.3% in 2017), after "sun and sea" with 72.4%, the goal of NTP 2018–2022 to diversify the tourist offer in Brazil by promoting the natural and cultural heritage should be recognized as having great potential to be better used. Brazil, moreover, is a country that is easily identifiable and recognizable by its vast and diverse natural areas available for exploration, in a responsible and sustainable way [20]. According to the report of the World Economic Forum [21], Brazil is in first place at a global level in terms of diversity of natural resources, as well as distinguishing itself in cultural resources. However, despite this advantage, in terms of "priority in the tourism sector," the country is in the 106th place in the world. This confirms the need for strategic planning in order to achieve significant improvements. The Brazilian Ministry of Tourism (Mitur) recognizes ecotourism as a "segment of tourism that uses, in a sustainable way," the natural and anthropogenic capital, "encouraging its conservation, with the aim of forming environmental awareness, to promote the well-being of the population" [22] (p. 17). Ecotourism has been discussed in Brazil since 1985, but at the government level the first initiative to organize ecotourism activities took place in 1987, with the creation of the National Technical Commission with the aim of monitoring the "ecological tourism" project [23]. In the following decade, coinciding with the United Nations Conference on the Environment held in Rio de Janeiro (1992), ecotourism gained more visibility and the issues of eco-technologies, human labor retraining, scientific-technical development and sustainability were discussed. A new focus on rural landscapes, forests, coastal regions and other ecosystems was called for, especially in relation to the way they are experienced, opening a debate on a new way of using and enjoying spaces by tourists [22]. The ultimate goal was to establish a sustainable relationship with nature and host communities committed to conservation, environmental education and socio-economic development [22]. In other words, ecotourism is emerging as a legitimate option to diversify the tourism offering in Brazil, given the need for innovation, competitive advantages and conservation of natural resources [24].

However, as a result of this interest in the practice of ecotourism supported by national tourism policies (guided by the principles of sustainability), according to Christiano Henrique da Silva Maranhão and Francisco Fransualdo de Azevedo [24], the National Tourism Plan 2018–2022 disregards these concerns. Neither the objectives nor the guiding principles, nor the lines of action of the NTP 2018–2022 give due importance to the ecotourism sector, including the contemporary policy directives of national tourism. It is not presented as a significant vector for the planning and management of Brazilian tourism; on the contrary, it seems weakened in its dimension as a "sustainable" practice, precisely because aspects related to environmental education and the participation of territorial stakeholders seem to be on the margins of the planning and management process. "For this reason, Ecotourism promoted in Brazil is still far from seeing broader and more significant results, from an educational, participatory and social point of view. Therefore, the challenge remains to standardize a language that not only meets the economic expectations of the various social groups interested in the development of the activity, but also provides a clear interpretation of its content and meaning, contributing to policy-making, planning and decision-making more consistent with reality" [24] (p. 33).

##### **5. Golf in Teresópolis: From a New Touristic Resource to Disused Space to Be Re-Functionalized**

Studying a touristic phenomenon on a local scale from a geographical perspective requires, as the literature urges, an integrated, transcalar approach which looks at the



territory and at the transformations induced by tourism. These are new spaces that are generated and modify the landscape without neglecting the global dimension that imposes new models, often capable of engulfing and transforming the local territory [25,26].

Aware of this complexity, the case of Teresópolis in Brazil is an example of a reality in which golfing, unlike the case of Apulia, no longer constitutes a representative segment of the tourism phenomenon. The context of Teresópolis is profoundly marked by its history and by the events that led to its birth and evolution within the Serrana region [27,28].

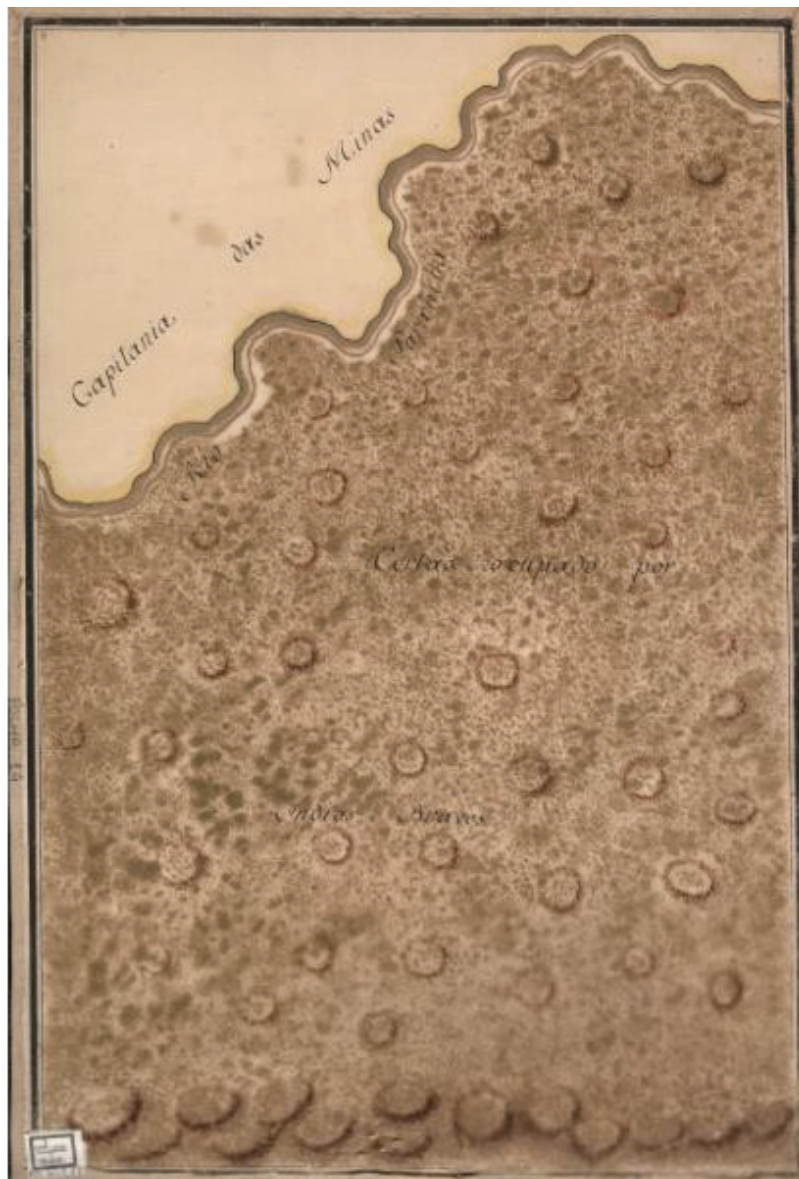
Some of the characterizing icons are still strategic today for the construction of a sustainable touristic offer because, if rightly valued and inserted in a network of both horizontal and vertical relationships, they can represent a strong response of the local territory to the demands of a dominant global touristic economy, often conformed and standardized. Attention to local values is not only dictated by cultural sensitivity, it is also justified by the fact that they generate a local economy behind which important family dynamics are hidden. Therefore, recognizing, enhancing and valuing the behaviour of family businesses and especially microenterprises becomes a strategic element in achieving sustainable and aware tourism.

The history of Teresópolis begins with a farm—the *fazenda* March—built by George March in 1813 who came into contact with the territory to undertake a mining activity (Figure 5). Having abandoned the idea, he devoted himself to a project of real territorial ruralization: from this moment on, the history of the settlement center began, strongly characterized by a distinctly agricultural function. Certainly, the work of March and his descendants has contributed significantly to the development of this reality, also affecting its economic and social functions, considering the English trader the founder of the city of Teresópolis. The territorial project put in place called for the improvement of infrastructures [29].

After the death of the founder of the March family, Teresópolis entered a new era characterized by the presence of heirs and the fragmentation of property into smaller farms, sites and plots, thus beginning a process of populating the region. Today the municipality of Teresópolis (Serrana region) covers an area of approximately 770 km<sup>2</sup> (Figure 6). The homonymous town has been developing in a north-south direction within the catchment area of the Paquequer River following its direction (*secundum naturam*) in the shadow of the Orgaos orogenic complex (Figure 7).

Examining the number of residences, an interesting fact emerges regarding their function with respect to the dynamics of internal tourism: of the 72,129 residences, approximately 16.1% are occasionally used as second vacation homes for the Carioca population, confirming the role that Teresópolis has been assuming since the second half of the 20th century [30,31].

An analysis of the Tourism Plan of 2001 (TP 2001), promoted by the State of Rio de Janeiro which includes Teresópolis in the Serrana (B) tourist region, shows that the entire region offers excellent opportunities with respect to the segment of ecological and rural tourism, which is already well advanced for Teresópolis and the municipalities of Vassouras, Paty do Alferes, Cachoeiras de Macacu, Petropolis and Nova Friburgo [32].



**Figure 5.** Detail of the topographic map of *Capitania do Rio de Janeiro* of 1767, kept in the National Library of Rio de Janeiro. An empty space reads: *Certão ocupado por Índios bravos* beyond the Orgãos mountains is represented in this map. The empty space and the caption “certainly occupied by good Indians” give us the information that this territory, where the city of Terepolis stands today, was practically unknown in the second half of the 18th century.



**Figure 6.** Details of the topographical map of Teresópolis (1:10,000) kept in the library of the UERJ State University. The center of Teresópolis developed *secundum naturam*, close to the Paquequer River and following its course, in the shadow of the Orgaos mountain range.



**Figure 7.** The city of Teresópolis, developed in the alluvial plain next to the Paquequer River. Photos by the authors.

The TP 2001 had identified, moreover, the presence of 14 natural attractions, six of historical-cultural types and five linked to traditional and popular events; in that same year, the touristic flows registered in Teresópolis came exclusively from the national borders (99.70%) and only in a small part from abroad (0.30%). The municipality had an important receptive capacity with a number of tourists that amounted to 506,155 visitors. (The report also highlighted Teresópolis' significant role in generating jobs in the tourism sector. In the ranking of the tourism region, it was third with 1616 employees after Petropolis and New Freiburg). The same report also highlighted Teresópolis' significant role in creating jobs in the tourism sector. The municipality was found to be third in the ranking of the touristic region, with 1616 jobs after Petropolis and New Freiburg.

With a responsible and sustainable view to tourism in 2010, the State of Rio de Janeiro launched a sustainable tourism development plan whose main objective was to develop tourism in an integrated and conscious manner, associated with cultural enhancement, conservation and community participation, resulting in creating jobs and income.

Six strategic regions have been identified, three of which belong to the coastal tourism centres and the rest to the mountain tourism centres. The latter includes Teresópolis, which is included in the Serra Verde Imperial region together with the municipalities of Petrópolis, Cachoeiras de Macacu and Nova Friburgo. This new taxonomy took into account homogeneity in terms of attractiveness, tourist segments, facilities and services, as well as distance and travel time from the capital.

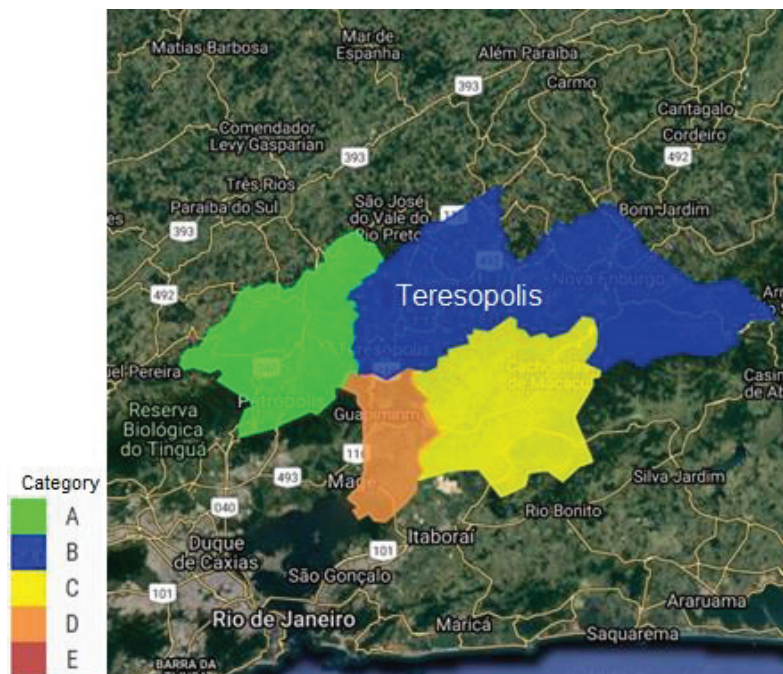
Furthermore, the Ministry of Tourism, with the aim of supporting municipal governments, classified them into five categories—the letter A distinguishes municipalities with an excellent performance while municipalities that present a mediocre and inadequate tourist performance are characterized by letter E—which return the tourist performance of these territories by evaluating the number of jobs generated by tourist activities and national and international tourist flows.

The thematic cartography (Figure 8), made from the touristic performance of the municipalities of the State of Rio de Janeiro, gives us, through the different colours, the information that the State of Rio de Janeiro consists of 57 municipalities in category A, 179 in category B, 539 in category C and 1961 in category D. Only one municipality belongs to category E. In this taxonomy, Teresópolis falls under category B. This hierarchisation tool improves tourism management, optimizes the distribution of resources and promotes the development of the sector.

The National Tourism Plan 2018–2022 has instead set itself the programmatic objective of modernizing and reducing bureaucracy in the tourism sector with the aim of expanding investments and facilitating access to credit to stimulate competitiveness and innovation, investing in the promotion of Brazilian tourist destinations not only on a national but also on an international scale, and by promoting a greater professional qualification of operators, strengthening decentralized management and regionalization processes in tourism.

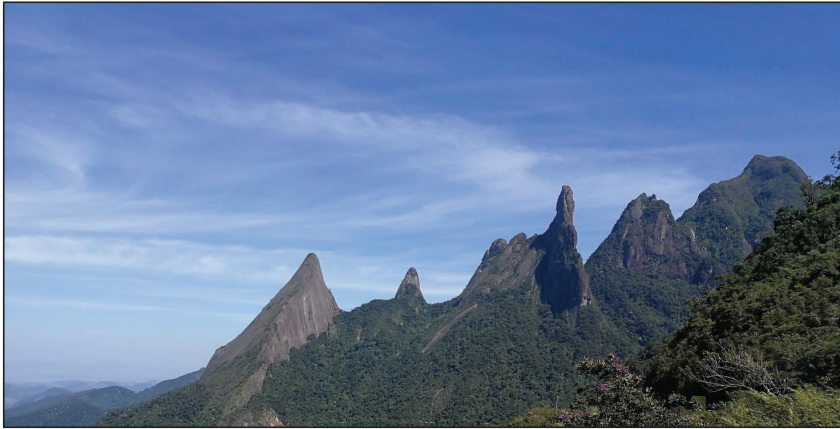
Quantitative data found at the Statistical Office of the Municipality of Teresópolis (sampling of visitors at the Tourism Office in 2018), although partial and incomplete, confirm that visitors who came to Teresópolis were predominantly Cariocas (83.25%) and Paulistas (8.16%); on the other hand, there were not many foreigners and it was mainly German (14.48%) and French (11.84%) welcomed, almost exclusively in the summer period, in 58 structures. These included nine agritourisms, of which 14 were located in the Centro district, 19 in the Alto area, 3 in Barra, 1 in Rio Bahia and 12 in Tere-Fri. According to the data provided by the Parco, the trend of visitors since 1992 has been increasing more and more until 2012, reaching a presence more than 137,000 visitors. The main and consolidated touristic function of Teresópolis, recognized by NTP 2001, remains that of a summer resort that attracts exclusively visitors from the metropolitan region of Rio de Janeiro in a type of short-term tourism, mainly related to the weekend. This phenomenon, despite being limited in duration and type of visitors, has a significant impact. Teresópolis is also recognized as a rural touristic resort since there is important economic activity in this territory linked to the rural landscape that provides a type of tourist attraction

increasingly required, especially by tourists from the city [33,34]. Moreover, this form of tourism strengthens and supports the economic activities of the primary sector, giving life to multifunctional agriculture. In this regard, a program to support the development of rural tourism has been promoted. Teresópolis is a part, together with the municipalities of Comendador Levy Gasparian, Guapimirim, Magé, Paraíba do Sul, Petrópolis, São José do Vale do Rio Preto, Sapucaia and Três Rios, of the IV area where there is a significant presence of rural farms of different sizes that present different agricultural activities in an extremely suggestive and attractive rural landscape. Furthermore, Teresópolis was included among the municipalities of the State of Rio de Janeiro where there is a record of business tourism. The TP 2001 summarizes that the seventh touristic region which, in addition to Teresópolis, also includes the municipalities of Cachoeiras de Macacu, Guapimirim, Nova Friburgo and Petrópolis, highlights the natural potential (orogeny that has given rise to unique forms such as the infamous Dedo de Deus) and environmental potential (Atlantic Forest of exuberant beauty) represented by the Serra dos Órgãos National Park, with a special attraction for trekking and mountain climbing (Figure 9).



**Figure 8.** Teresópolis, which is part of the Serra Verde Imperial tourist region, is among those municipalities with a good tourist performance, marked with the color blue which refers to the letter B. Source: <http://mapa.turismo.gov.br/mapa/init.html#/home> (Accessed on 26 April 2021).

A positive factor is also represented by gastronomy, enriched by a culinary tradition. The touristic region offers excellent opportunities for the development of activities related to ecotourism, rural tourism and business tourism (Figure 10). The presence of fairs and conventions enhances the touristic offering. There are also weaknesses, mainly due to poor road infrastructure which lacks the awareness of the importance of tourism for the regional economy, lacks a public safety system and lacks the advertising of events. Another weakness of regional tourism is the lack of coordination between local bodies and institutions which do not work in an integrated manner.



**Figure 9.** Serra Dos Orgaos, photographed from the Vista Soberba viewpoint, Teresópolis. Starting from the left mountain-tops: Escalavrado, Dedo de Nossa Senhora, Dedo de deus e Cabeça de Peixe. Photo: under the care of the authors.



**Figure 10.** The densely cultivated countryside between Teresópolis and Nova Friburgo. Source: photograph by authors.

## **6. The Teresópolis Golf Club and the Perception of the Touristic Landscape through a Quali-Quantitative Analysis**

Among the many attractions of Teresópolis, the Teresópolis Golf Club (Figure 11) founded in the first half of the twentieth century emerges. This structure that has great potential today is experiencing a moment of great difficulty and seems like a cathedral in a desert, alien to a context that does not recognize and value it. Teresópolis Golf Club was the eighth golf club founded in Brazil.



**Figure 11.** Details of the Teresópolis Golf course. Source: by the authors.

It all began in 1934 when a group of friends from the upper middle class of Rio de Janeiro, called by Carlos Guinle, a doctor, met in Rio de Janeiro to lay the foundations of Teresópolis Golf Club, a sports club set up on land (500,000 m<sup>2</sup>) generously donated by the Vieira family, free of charge and for an indefinite period of time, with the hope of enhancing the value of that territory so as to make it even richer and more economically fruitful [35]. The club should, as stated in the intentions defined in the founding document, provide its members with a sporting space to practice golf, tennis, swimming, horseback riding, as well as social, artistic and athletic meetings, and should have also provide an airport equipped for efficient military use. Today we could have called it a multipurpose space. The Vieira family had become owners of these and several other lands in Teresópolis thanks to José Augusto Vieira, who in 1895 received the concession to build the railroad that would connect Teresópolis with Rio de Janeiro. Other lots were added to the first one sold by the Vieira family so that in 1937 the first sporting activity took place. The nine-hole golf course of Teresópolis was designed by the Canadian architects Thompson and Jones who were in Brazil to design a golf course in the municipality of Itanhanga. In 1939, *GOLF* magazine was founded, a bimonthly publication created to advertise the Club and, above all, to attract new members. A swimming pool was built in the 1960s and it attracted a large number of visitors, so much so that the entrances were regulated. In the 1970s and 1980s the offer of the Golf Club of Teresópolis expanded to include courses, swimming competitions and gymnastics, as well as an intense social activity that promoted parties, dinners and art exhibitions. Towards the end of the 1970s, the Club's financial situation was very critical, with debts and damage to the golf course mainly due to summer rains. The world economic situation in the 1980s, with persistent inflation, the increase in fuel prices, the cost of living that was increasing more and more and the environmental problems due to the flooding of the Paquequer River significantly compromised the fortune of this center, leading to a gradual number of members who stop paying their dues. Of the 403 members at the end of the 1970s, there were about 328 in 1982, destined further to decrease. Expenses were rationalized, starting with personnel (10 employees were laid off). This precarious situation has marked the club even now, as confirmed by the current president, who highlighted the serious economic conditions in which the club finds itself,

increasingly losing members, identity and functions despite processes of redevelopment and refunctionalization. Today, golf tourism lives, or rather survives, with great difficulty in a territorial context that neither recognizes nor values it. In the various plans for the development of tourism, there is a total lack of attention and valorization towards that trend of golf tourism that, in Brazil, has been an important tradition since 1958 when the Brazilian Golf Association was created in Rio de Janeiro and transferred to Sao Paulo in 1960. With the inauguration of the Olympic Golf Course in 2015 in Barra da Tijuca, Rio de Janeiro, which hosted the return of golf to the Olympic Games after 112 years, an important season for golf began, whose numerous and increasingly equipped and functional facilities in the Brazilian territory recreated a new geography of Golf. This was done by favoring sport realities linked to multifunctional urban centers rather than to peripheral realities that had an attraction for the native population in the twentieth century. This was an opportunity for tourists at the golf center, located in a suburban reality, not only to play the sport but for relaxation from chaotic city life. The qualitative and quantitative surveys carried out in the city of Teresópolis confirm what has been shown so far. The city of Teresópolis is visited very rarely (78% come only once) and the type of visit is mainly limited to one day (hiking). For tourists who stay overnight, many choose to stay at a hotel (68%). They reach the city mostly by their own means (75%) and to a lesser extent by public ones. Teresópolis is chosen, in order of priority, as a destination that will allow them to go for a walk, to be in contact with nature, to buy at the fair and to experience a tourism linked mainly to ecological sustainability rather than golf. The main attraction, in fact, is the Serra dos Orgaos National Park. With reference to the perceptive aspects, Teresópolis is preferred for its safety, its environmental quality and also for its gastronomy, but there was no opinion on the golf center. The qualitative-quantitative and documentary survey, the meeting with the stakeholders and the field research through the questionnaire give a clear picture of the economic, social and cultural reality of Teresópolis that presents itself with an important touristic potential that is not sufficiently valued and put into place. Teresópolis is recognized for its environmental values, its rural landscape and also for its social and cultural activities, starting with the handicraft fair. The national development plans that have recognized Teresópolis as an important tourist attraction have included it in an inter-municipal network in order to fully develop the many iconic elements of the landscape of Teresópolis, together with the hope of creating a more organic and structured touristic offer to determine more conscious and sustainable tourism. Until now, this has been characterized by a mainly excursionist form and a touristic formula circumscribed in time that has recorded little economic impact on the territory. The weaknesses of the municipality of Teresópolis are certainly to be found in the precarious road infrastructure, the lack of awareness of the importance of tourism for the local economy, the lack of a promotional system and the lack of development of the municipality consistent with the territorial vocations. There is a lack of coordination between local bodies and institutions which do not work in an integrated manner, resulting in a segmented and often inconsistent touristic offer. With regards to golf, it should be clarified that the problem is limited to the golf club of Teresópolis, but not to golf in general, which in Brazil, as in most of the rest of the world [36], enjoys good health, boasting its own tradition as evidenced by the many activities in Brazil. The golf center of Teresópolis was born from a wealthy bourgeoisie that in Teresópolis had identified, a pleasant place where you could enjoy, thanks to the mild climate, a favorable environment, especially in the summer. In this area, which had a rural vocation, as the territorial history of Teresópolis teaches us, a sports club was implanted in a top-down process that was to have the function of upgrading the area by offering a viable alternative to the urban middle class that in the summer and weekends sought a place to practice sports. More generally, a real *lusus* was confirmed by the infrastructure works that were created in the years following its foundation. The crisis at the Teresópolis golf center stemmed from an international economic crisis that then affected the middle class on a local scale, which immediately renounced a series of benefits including membership in an exclusive but expensive club. The decrease in registrations and the arrears of many



members who were then excluded from the club could be seen both in the interview with the President of the Golf Club and in the documents analyzed. The arrears and expulsions affected the finances of the golf club, compromising its functionality at full capacity and assuming more and more new functions so as to no longer be recognized by the community as a golf center. The creation of new centers related to the urban and international context such as in Rio de Janeiro contributes to making the Golf Club of Teresópolis an increasingly marginal and little-known structure.

## **7. Conclusions: The Development of Golf, a Sustainable Touristic Resource to Be Monitored for the Protection of Traditional Rural Landscapes**

Cultivated fields and golf courses, known as the primary sector and the tertiary sector, are competing for use of rural areas to which financial investments are being directed with increasing interest, as is always the case in the phases of the economic crisis, such as the one we have been experiencing since the beginning of the third millennium. Land grabbing and acquisition of vast agroforestry areas, regardless of the use that is stated to be its intention, are phenomena so widespread and scandalous that we need a reflection at all levels of political-administrative management, from the local to the international [37]. The land grabbing and land concentration processes are heavily conditioning any attempt to implement sustainable and supportive forms of economy, including those linked to tourism and sports activities, which are the most suitable, at least in theory, to safeguard the well-being and health of man and the environment. The two case studies examined relating to the tourism and golf show that sustainability, ethics, enhancement of the territory and recovery of traditional quality products are objectives always motivating land investments even if the results, inevitably submissive to private interests, always respond only to speculative needs. The Italian example of the Apulian region and the Brazilian example of the Serrana region are united not only by the graft of golf facilities in two territories with a deep-rooted agricultural tradition, but also by rural landscapes definitely attractive for their high cultural and environmental value.

The experience started in 1934 by the golf center of Teresópolis to enhance for touristic purposes lands already profitably exploited by flourishing agricultural activities can teach a lot to the ancient Apulian farms (Torre Maizza; San Domenico), which in recent decades have been transformed into luxurious hotels. The fragmentation of the historic Brazilian fazenda into small farms, carried out in the second half of the 19th century, had the merit of promoting the demographic and touristic development of the entire area, while the construction, a century later, of the Golf Club sports center—solicited not only by the amenities of the place but also by the beauty of the agricultural landscape—has gradually been extinguished, along with the touristic interest, tertiary activities and employment opportunities for the local workers. Today that same structure, which has not been able to communicate with the local agricultural reality, is now abandoned and, precisely because it is extraneous to the territorial context, it appears lacking in attractiveness, even a disgrace in the presumption of wanting to impose models of development extraneous to the traditional culture. The most recent creation of golf clubs in Apulia seems to have learned this lesson: some agricultural land of the historic farms, which have also given up more than half of their cultivated area to the artificial lawns of the golf courses, preserve the traditional crops of centuries-old olive trees that have remained to narrate the traditional farming culture. A choice that, even if entrusted by local entrepreneurship to international groups, seems to avoid the risk of an irreversible violation of rural reality being expressly motivated by the desire to protect and enhance the identity landscape heritage. It is therefore up to geographers to monitor the transformations of these territories over time, just as it is up to regional and national administrations and governments to ensure that so many precious historical heritages are truly combined with the most current innovative instances for the benefit of local development. Only by implementing these control actions will we be able to extinguish the fears repeatedly expressed by scholars and environmental associations [16] over seeing agricultural landscapes of great beauty, true monuments to ingenuity and the tenacity of farmers, disappear.

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## Article

# Mărginimea Sibiului Tells Its Story: Sustainability, Cultural Heritage and Rural Tourism—A Supply-Side Perspective

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**Abstract:** Territorial development and rural tourism are linked. Rural tourism involves tourists in rural areas who are attracted by the distinctive character of the landscape, recreation such as local and food resources, and the potential for spiritual, environmental, and cultural growth. The aim of the present paper is to investigate the economic, sustainable, and social role of tourism in the development of the rural area of Mărginimea Sibiului in Romania. It highlights the role of local entrepreneurs in developing new practices and sustainable approaches. Drawing on the literature review on the topic of sustainable rural tourism, this paper uses the case study as a methodological approach. We have developed consistent desk research relying on the processing of official governmental data and of national statistics, supported by analytical strategies involving induction and deduction. The main findings lead towards the conclusion that Mărginimea Sibiului has managed to gain both national and international notoriety while developing coherently, capitalizing on its natural and cultural heritage, and providing services in successful agritourist boarding houses and rural guesthouses, which have continuously developed both numerically and in terms of comfort levels. Because more than two thirds of the initially established lodgings in the early 2000s continue to function today, these facilities have proven to be sustainable and attractive businesses.

**Keywords:** Romania; case study; territorial valorization; sustainable development; rural hospitality services; Transylvania



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## 1. Introduction

The tourist phenomenon represents one of the most efficient segments of the world economy, characterized by its dynamics, multiple motivations, as well as the great diversity of forms of manifestation [1]. During 2008–2018, the contribution of tourism to total GDP increased in 43 of the 70 countries that reported data. This highlights the growing importance of tourism in the global economy as well as its potential for contributing to inclusive and sustainable economic growth [2]. Tourism also has a leading role in promoting the perception of the destination internationally [3].

Tourism is an indicator of development and can make a significant contribution to economic growth, diversification of sociocultural activities and sustainable and territorial development if it is methodologically planned and limited to the imperative purpose of

humanity in which defending and improving the quality of the environment becomes vital [2,4].

Territorial development is a complex phenomenon that affects the entire economic, social, political, and cultural life of a territory. Among the internal factors with an important role in prioritizing future investments in agriculture, within a region, are the following: agricultural resources; geographic position; human resources; agricultural capacity and structure; the image of the region in the world; dynamics and level of modernization reached; the level of competitiveness of important agricultural products and, last but not least, the development of tourism, as an important factor in inducing demand for domestic agricultural products [5,6].

The major objective of territorial development, according to Benedek [7], is to cover local and regional human needs, the most important of which are to provide access to employment, economic growth, the formation of production networks and services strongly integrated in the context, local and regional development, and the creation of a regional environment conducive to development [8,9]. The territorial approach aims to make places more competitive and attractive in a national context and in a globalized environment. The territory is considered the place with its own histories and identities, where local heritage and assets are used as elements and motives for regional construction and sustainable development. It is relevant in the rural areas.

Rural areas are vital for the European Union (EU) because they cover almost 88% of the territory and account for 59% of the population [10]. In Ireland, Slovenia and Romania, more than half of the people live in rural area.

The adoption of a code outlining the guiding principles of balanced rural development—as well as sustainable development of the agricultural sector and also of the rural area at continental level, such as the European Charter for Rural Areas (April 1996)—was based on the multifunctional and sustained development of the rural environment and the sustainable exploitation of the available natural resources, taking into account the fact that most of the food for the population of Europe, especially important raw material resources, comes from these areas [11]. Rural areas are currently undergoing significant economic and social changes, largely driven by the liberalization of international trade, the development of communication technologies and the strengthening of rural development policies [12,13]. It is widely accepted that agriculture is no longer the “backbone” of the rural economy, and its contribution to GDP and employment in most rural areas is in relative decline [14].

Most EU rural areas undergo significant economic and social changes. There is a growing awareness of the need to accompany change in rural areas by diversifying their economic base which seems to be the only answer to their socioeconomic survival [12]. Improving the competitiveness of rural areas means supporting the quality of life of the rural community and encouraging the diversification of economic activity in rural areas [13]. The measures found in the new EU Common Agricultural Policy (CAP) for the 2021–2027 timeframe highlight the establishment of a more intuitive and innovative policy, ensuring that the CAP is able to continue to support European agriculture, facilitating the creation of prosperous rural areas and ensuring production of high-quality food in the coming year [14].

The rural environment is the repository of resources for a new beginning of new economic thinking. One of the most popular rural development strategies has, of course, been to develop rural tourism and to capitalize on its associated entrepreneurial opportunities aiming at generating money, creating jobs, and supporting the growth of retail trade [15].

Rural tourism—based on three coordinates: space, people and products—attracts large numbers of tourists, triggered by the distinctive features of the landscape and the richness of local resources, in rural areas that constitute recreational features and ensure spiritual, environmental and cultural growth [16]. The tourist is also preferentially polarized by the places of production that are typical for a certain area to learn about food, to understand local production systems and techniques, to discover material testimonies (old

cars, buildings, etc.), to immerse in the local culture (folk art, crafts, etc.), resources that define the concept of territorial identity [17].

Similar to other regions of Europe, rural areas in Romania have experienced a decline in agricultural activities, the restructuring of rural society and increased abandonment of agricultural land due to the aging of the rural population and to the migration of young adults to urban areas or abroad, to countries in the center or the west end of the continent [18]. From among all of these consequences, the aging of the rural population endangers the sustainability of rural areas.

In this context, it is relevant to remind the health emergency triggered by the COVID-19 pandemic. Moreover, one cannot but consider its dramatic impact upon the tourism and hospitality industry. It is producing new rules and determines the adoption of innovative ways for providing and carrying out activities in tourism and hospitality. The worldwide economic damages caused by the impossibility of travel due to the pandemic are truly enormous for almost all countries, with rural destinations being affected even worse.

Despite the many restrictions and the impossibility of travel due to the pandemic situation, people are still eager to return to their previous habits. Furthermore, in the current context, tourists tend to lean towards small lodgings, in remote destinations, considering opting for self-catering services. This orientation clearly favors rural destinations [19].

The objective of this paper is to investigate the economic, sustainable, and social roles of tourism in the development of the rural area Mărginimea Sibiului, in Romania. This study aims at identifying the role played by the rural cultural heritage as a tool in promoting rural tourism and as a means of increasing the competitiveness and resilience of the destination, to increase tourism efficiency and to contribute to the development of more sustainable forms of economic development. In addition, the current growth of rural tourism, as well as its forms of organization, are explored to clarify a paradigm specific to territorial development. The paper continues with a section comprising the literature review dedicated to rural tourism, sustainability, and resilience. Further, the most consistent part of the article consists of a case study on Mărginimea Sibiului, which debuts with an argumentation of the chosen research methodology, which also includes the research aims of the paper. The findings of the analyses are discussed throughout the dedicated section. The final part of the paper summarizes the main conclusions, points out the limitations of the research and highlights the future development perspectives.

## 2. Rural Tourism as a Form of Resilience

Economic growth is one of the most well-known positive overall effects of tourism, and, particularly in rural settlements, it increases income, thus, improving the local stakeholders' quality of life by providing diversified employment opportunities, in order to reduce poverty in rural settlements [20]. Furthermore, tourism development also has social impacts, improves social welfare, and enhances cultural centers and local pride [21].

The development of tourism in developing countries is seen as an economic generator capable of reducing poverty and of increasing income, achieved through the organizations' awareness to preserve their cultural heritage and the stakeholders' networking with the surrounding environment [22]; in developed countries, the empowerment of the local stakeholders has been achieved by enhancing responsibility and participation in sustainable tourism development.

Rural tourism is considered a small-scale form, controlled by local people who run small family-owned businesses and strong connected by cooperation and integration in order to gain benefits for the stakeholders involved, having traditional character and determining a low impact on both nature and rural society. It is also closely linked to sustainable tourism and seen as a win-win situation for local residents, tourists and the environment [23].

Woods [24] defines rural tourism as "touristic activities that are focused on the consumption of rural landscapes, artefacts, cultures and experiences". A significant importance is granted to the sensory impressions in the rural tourism experience [25,26], and because

these are place-related [26], they are referred to as rural sensescapes. Important links exist between developing sustainable food experiences for tourists and policies for agriculture, food production [27], tourism, cultural and creative industries [28,29], especially country branding

Haven-Tang and Jones [28], as well as Privitera et al. [30,31], emphasize the strong relationship between agricultural products, culinary heritage and tourism allowing the visitors to participate in the local food and drink supply chains, enhancing their involvement in the “rural experience” and their contribution to local development. It is often argued that local food, perceived as authentic and linked to local culture, works as an effective tool to sustain rural tourism and rural communities [16,32]. Additionally, it has been observed that rural tourism can be a catalyst for socioeconomic development and regeneration [33], especially valuable in places where traditional agricultural activities are in decline [34].

Rural regions with many heritage sites became more visible to visitors if accompanied by interpretative centers that offer good infrastructure and service facilities. Studies as Butler et al. (1999) [34] emphasize the need to distinguish sustainable tourism and the development of tourism on the principles of sustainable development, while Leeuwis (2000) [35] reconceptualizes participation for sustainable rural development towards a negotiation approach, revealing that the implication of the actors in sustainable tourism development is considered a process of learning, decision making and social learning.

Generally, rural accommodation facilities are small units, locally owned, which allow a differentiation of the rural tourism product and a personal contact with hosts, representing the key reason why people choose rural holiday [36]. Sustainable accommodation and lodging represent an important aspect in sustainable tourism development. Hall et al. (2016) [37] present the results of a systematic analysis of articles on attitudes, behaviors and practices of consumers related to the provision of accommodation with respect to sustainability.

The European Commission launched in 2013 the “European Tourism Indicators System” (ETIS) as an integrated tool for the sustainable development of destinations across Europe; its main goal is to provide a practical tool for destinations to manage and improve sustainable tourism at local level. This system comprises 27 core indicators and, additionally, 40 optional indicators [38].

Agritourism “represents a sustainable on-farm connected, complementary and diversified activity for family conducted working farms with predominating agricultural activities, which are producing for the market to generate additional agricultural income” [39]. It is considered a key factor for local development [40–43], mostly for marginal rural areas where the possibilities of developing alternative job options are restricted. Moreover, agritourism participates in maintaining the sustainability of the rural localities, considering that the depopulation phenomenon is clearly manifested by the migration of young people to urban regions and abandonment of their houses. The uniqueness of agritourism products includes specific identities, such as landscape, traditions, traditional food, art and culture, the farm life and life in nature. It is seen also as an activity that can be considered an ally of agriculture, mainly from the point of view of the conservation and protection of the rural landscape. Usually, tourists involved in agritourism are taught the way organic foods are produced and directly participate in certain processes related to cultivation or harvesting [44]. The stakeholders’ involvement is agreed to be critical [45,46]; moreover, a number of studies explore sustainability imperatives from the point of view of rural communities [47].

Aronsson [46] outlines in his study that locals will generally accept and back-up tourism if it yields sociocultural and socioeconomic benefits and if the environment is protected. Local community participation remains vital in the process of pursuing sustainable tourism [48]. Bramwell [49] also revealed that the participation of destination communities is a key element for attaining sustainability through their involvement in tourism planning and governance.

Small tourism entrepreneurs have a significant importance in rural development because they contribute to the revitalization of the social and economic life of a community by generating income that can improve the environment and landscape through a higher level of general business activity [50]. Lee and Jan [51] indicated that managers of community-based tourism (CBT) may provide educational services and farming experiences that will increase tourists' satisfaction and create new income sources in agricultural communities, which will promote economic sustainability.

The sustainable development in tourism is a dynamic concept, which has direct effects on competitiveness [52], and its principles focus on three essential issues: the environment, economy, and sociocultural development. In order to generate sustainability at the destination level, a coalition of independent tourism partners and organizations, annually awarding worldwide sustainable-oriented destinations from around the globe, named Sustainable Destination Top 100 was created [52].

Jugănaru et al. [53] suggested a list of sustainable tourism types including ecotourism, green tourism, rural tourism, equitable tourism, and responsible tourism. Sustainability in tourism represents the future of the sector and outlines a variety of practices such as ecotourism, nature-based tourism, heritage tourism, community-based tourism, and rural tourism [54].

Sustainable rural tourism aims to increase destination sustainability, concerning the long-term improvement of living standards, by maintaining the balance between environmental protection, the promotion of economic benefits, the establishment of social justice, and the maintenance of cultural integrity [55].

According to Javier and Dulce [56] (p.2), "sustainable tourism development refers to the management of all resources that meets the needs of tourists and host regions while protecting the opportunities for the future, in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems". Another study [57] describes three principles of sustainable tourism, namely the quality experience for visitors, improvement of the quality of life of the host community, continuity of natural resources and equilibrium between the needs of hosts and of the environment. Further, other researchers [57] deal with sustainable tourism in terms of economic, environmental and sociocultural principles as the "triple bottom line". Some scholars carried out studies related to aspects such as tourism environmental carrying capacity [58], tourism environmental quality assessment [59], tourist ecological footprint [60], and satisfaction in sustainable tourism [61].

### 3. Rural Tourism in Romania and the Case of Mărginimea Sibiului: An Overview

#### 3.1. Rural Tourism in Romania

In Romania, rural tourism has been practiced sporadically since the 1940s [13,15]. For the organization and promotion of tourist villages in the area between the Carpathians, the Danube and the Black Sea, the Research Center for the Promotion of International Tourism (RCPIT) conducted a study in 1972, which led to the identification and selection from among all the ethnographic areas of the country, of a number of 118 rural localities (further considered as tourist villages). In 1973, only 13 localities were declared experimentally tourist villages (out of which two villages from the microregion Mărginimea Sibiului—Rășinari and Sibiul). Of these localities, nominated as tourist villages, only two rural settlements were truly operational for tourism (Sibiul and Lerești, Argeș County), along with the framework for organizing, operating and guiding tourism and promoting tourism in these localities [15].

The promotion in the 1970s by the Carpathian National Tourism Office of the tourist program "Wedding in the Carpathians" in the villages of Bogdan Voda (Maramureș County), Sibiul (Sibiu County) and Lerești (Argeș County) was a favorable premise for the development of rural tourism in regions with a more accentuated ruralism (Maramureș Depression, Mărginimea Sibiului or Argeș Subcarpathians).



After 1990, the interest for the affirmation and development of tourism in rural areas was revived with the establishment of several associative forms: Opération Villages Roumains Association, Romanian Federation for Mountain Development, National Agency for Rural, Ecological and Cultural Tourism, founded in 1994 and member of the Federation European Agency for Rural Tourism (EUROGÎTES), especially the Romanian Agency for Agritourism (1995) [11].

At the end of the 1990s, David Turnock made a pertinent radiograph of Romanian rural tourism where 45 tourist villages are mentioned (especially viable tourist villages from 1973, villages with registered tourist activity in 1992; pilot tourist villages proposed by Opération Villages Roumains in 1995, and the villages with more than 10 tourist reception structures with accommodation functions, included in the first PHARE Program for rural tourism in Romania, at the level of 1996, a program that aimed at ensuring the mechanisms for an interconnected computer system at the European Central EUROGÎTES reservation systems) [62]. The main regions, counties and localities with intense tourist activity are located in the Carpathian, sub-Carpathian areas, the Hilly Depression of Transylvania, the Suceava Plateau, the Mehedinți Plateau and in the Danube Delta.

Previous studies [63] show that Sibiu County attracts a large flow of tourists through the localities belonging to the five microregions with a pronounced multicultural character (Mărginimea Sibiului, Țara Secașelor, Țara Oltului, Valea Hârtibaciului and Valea Târnavelor), to which is added the cultural personality of the city of Sibiu [64]. The older antecedents of rural tourism in Mărginimea Sibiului are complemented by other significant events, which led to a renewed interest in rural tourism as a factor of socioeconomic development and regeneration of rural areas, such as designation of Sibiu as European Cultural Capital in 2007, next to the capital of the Grand Duchy of Luxembourg; the recognition in 2015 of the Mărginimea Sibiului microregion as a European Destination of Excellence for Tourism and Gastronomy; the designation of Sibiu County in 2019 as European Gastronomic Region along with the South Greece region (Greece); and, last but not least, the most recent statute of Sibiu County, that of Europe's Hiking Capital, as the host destination of Eurorando.

### 3.2. Research Methodology

Due to the fact that this paper focuses on establishing whether the destination under scrutiny has managed to develop a successful form of rural tourism and what determines its success, the case study method has been identified as the most appropriate research method for this purpose. Therefore, the authors have opted to employ the case study method for a better understanding of the development of sustainable tourism and sustainable rural lodgings in Mărginimea Sibiului.

The authors have opted to employ the case study as qualitative inquiry method [65–69], bearing in mind that qualitative studies represent a large area and can consist of exploratory, explanatory, interpretive, or descriptive purposes. They can be carried out as narrative research [67] responding to the researchers' needs to illuminate understanding of complex phenomena [65,70,71] and situations. The case study method has been considered appropriate for the purpose of the current analysis due to the fact that it is exploratory and explanatory in nature and it enables the comprehension of real life contexts, primarily providing answers to research questions such as *how?* and *why?* and sometimes, also, *what?* [65,66,70–74]. Furthermore, Stake [75] emphasizes that the focus of the researcher falls on what is studied (the case) rather than how it is studied (the method).

The authors aim at establishing and evaluating the context of rural tourism development in Mărginimea Sibiului and the perspectives of its sustainable development, relying on induction and deduction, inter-related processes that have had a significant contribution to the assessment, analysis, interpretation, and understanding of the past and current state of the hospitality services provided in the investigated area. The authors considered the past and present-day situation as registered by the Romanian Ministry of Tourism (MT), especially by the National Authority for Tourism (NAT) (governmental operational struc-

ture subordinated to various ministers over the timeframe of the study); throughout the paper, the institution is going to be referred to as MT/ NAT. The second important source of secondary data was the National Institute of Statistics, based on which data regarding the destination's demographics, socioeconomic development and tourism supply-side statistical data were collected and processed with the purpose of assessing the destination's sustainable development. In order to achieve this goal, the authors formulated several research questions. Thus, the paper aims at the following:

- establishing whether tourism contributes to the wellbeing of the destination's inhabitants;
- establishing how the destination's supply has developed and how it performs compared to the county of Sibiu to which it belongs;
- identifying the type of ownership and operation of the hospitality services in the area;
- assessing the dimension of women-entrepreneurship.

This is the first stage of a series of studies that are dedicated to the same destination. These shall further address both the demand and the supply sides. Thus, the next research stage will include in-depth interviews with the entrepreneur-managers of the providers of hospitality services (mainly lodging and foodservices) in the area and interviews with the destination's stakeholders, aiming at comprehending what triggers them to invest and to operate businesses providing lodging and foodservices as well as a better understanding of how they perceive the future of the destination, especially how they adapt to the new situation. Given the difficulties encountered by the sector at this moment, generated by the pandemic situation, it was decided not to postpone the interviews. Moreover, the future research directions shall address the demand-side as well, having in mind the fact that the destination features many relatively small accommodation facilities that, in the new COVID-19 context, seem to be more attractive for both domestic and international tourists.

### 3.3. The Case of Mărginimea Sibiului

In this study, the ethnographic area, Mărginimea Sibiului, from Sibiu County of Transylvania (located in the Center Development Region of Romania) represents the 'case' selected for this research that proposes to highlight the sustainable development of the destination and to analyze it from the supply-side perspective. The case study has been elaborated using desk research methods and employing national statistics and databases of lodging, food and travel services provided by The National Authority for Tourism under the coordination of the ministry in charge of tourism activities or by the Ministry of Tourism. The selection of these sources of data was determined by the fact that the National Statistics Institute does not collect data from lodgings with less than 10 beds; therefore, small lodgings are missing from the national statistics, while they are typical for Romania's rural destination and have become extremely attractive in the current COVID-19 context. The first available database was published by the National Authority for Tourism in 2005, covering lodgings established between 2000 and 2005. Further, it has been established to work with the databases of 2010, 2015, 2016, 2020 and 2021. Lodging and foodservices have been analyzed both at the level of the microdestination and in terms of their contribution to the lodging supply of Sibiu County. Travel services have been cached in all available databases.

Mărginimea Sibiului is a unique ethnographic area, located in Southern Transylvania, in Sibiu County, Central Region (Figure 1). It belongs to the contact area between the hilly depression of Transylvania and the Cindrel Mountains, in the longitudinal submontane depression Sibiu-Săliște, which has a sedimentary basin located in the immediate vicinity of the mountain [63].

To the north and south, the depression is bounded by high hills of 450–500 m and mountain ranges that rise to 900–980 m. Between these altitudes, the combination of natural ecosystems—forests, agriculture, and human cultural system—forms a unique relationship of perfect integration and of major importance for the region's sustainable development.



**Figure 1.** Geographic location of Mărginimea Sibiului in Sibiu County. Adapted with permission from ref. [30].

From a climatic point of view, tourist activity is possible throughout the entire year. The average annual temperatures are of 8–9 °C, with 18–19 °C during the summer season, and of −4, −5 °C in the winter. The average annual rainfall is of 650–700 mm, with maximum values in June and February [76]. During the winter there are temperature reversals in the depression, while in the spring the foehn manifestations of the Great Wind from the Cindrel Mountains are registered [76]. The conditions offered by the relief and the cool climate have imprinted the soil cover with particularities that make them usable by grazing for shepherding or for various agricultural crops (cereals, technical plants, fruit growing).

The good sheltering conditions of the mountain with its wood and grazing resources, as well as the agricultural space in the depression, have contributed to the constant increase in the number of inhabitants and the formation of viable human settlements. Of these, 18 localities are comprised by the Mărginimea Sibiului microregion: Boița, Sadu, Râu Sadului, Tâlmăciu, Tâlmăcel, Rășinari, Poplaca, Gura Râului, Orlat, Fântânele, Sibiul, Vale, Săliște, Galeș, Tilișca, Rod, Poiana Sibiului, and Jina [63]. These localities belong to 12 administrative territorial units (ATUs), of which two are towns (Săliște and Tâlmăciu) and the remaining 10 are communes. Săliște comprises three of the villages: Fântânele, Sibiul, and Vale, while Tâlmăcel belongs to Tâlmăciu town [77]. The localities have developed a mixed economy, based on agriculture, zootechnics, and traditional crafts, with a special weight on shepherding. Most of the villages in the area have kept strong spiritual and ethno-folkloric traditions, continuing to stay alive as they depended on each other, according to Cristian Cismaru, co-founder of My Transylvania Association [78]. Crafts inherited from ancestral times are still practiced successfully today. Since ancient times, these populations of shepherds have been and still are master artisans in wool and leather processing.

The gastronomy of the Mărginimea Sibiului area is widely appreciated and recognized, due to the traditional agricultural products and through the Saxon or Hungarian influences in the Romanian cuisine. The gastronomic profile is shaped by ancestral practices such as the large and small transhumance of sheep herds; old traditions in the production of *telemea* (a fresh, feta-type cheese), bellows cheese (a hard, salty and kneaded cheese kept in the

stomach/skin of sheep), kneaded cheese or *urdă*, and the cottage cheese, too; the presence of the bread oven and the cultivation of vegetables and herbs in the traditional household; food preservation in community spaces; the cultural interaction of Romanians, Saxons, Hungarians, Armenians and the more recent influences of European or Asian cuisines [63]. Like in other Transylvanian spaces, the Gypsies also contributed to the development of multiculturalism in Mărginimea Sibiului [79]. Therefore, the anthropic tourist heritage also has an important intangible component; its potential is beginning to be explored.

Mărginimea Sibiului provides the landmarks necessary for community definition, but also for stimulating energies and initiatives capable of contributing to the strengthening and affirmation of local identity in a multicultural Europe and in an increasingly globalized society.

Over time, Mărginimea Sibiului has become an important destination in Romanian rural tourism, developing many agritourist and rural tourist boarding houses and where the typical peasant atmosphere is preserved, the local traditions and customs are kept intact, and where the hospitality of its inhabitants also increases the attractiveness for these places.

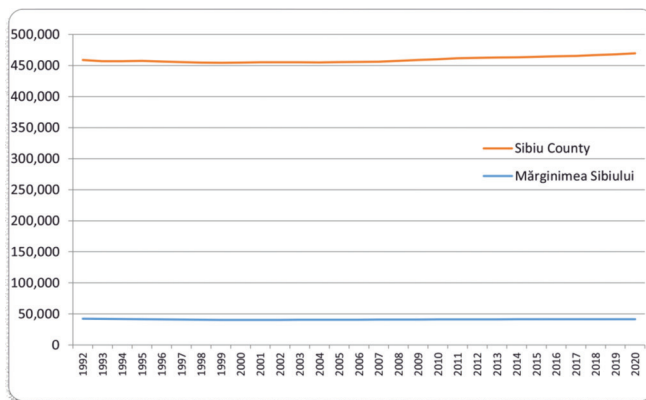
### 3.3.1. Economic Development and Wellbeing in Mărginimea Sibiului

Not in line with the national decreasing trend of the population, over the nearly past three decades, Mărginimea Sibiului has had a relatively stable population, accounting for, on average, 8.94% of the county's total population, but it has not followed the slightly increasing demographic trend of Sibiu County. While in 1992 the total population of this microregion gathered 42,396 persons, the number slightly diminished to 41,341 people, dropping by 2.5%, while the county's overall population increased by 2.3%. Most localities lost a part of their population, except for four communes: Gura Râului, Orlat, Poplaca, and Sadu, which gained in terms of inhabitants (Figure 2a).

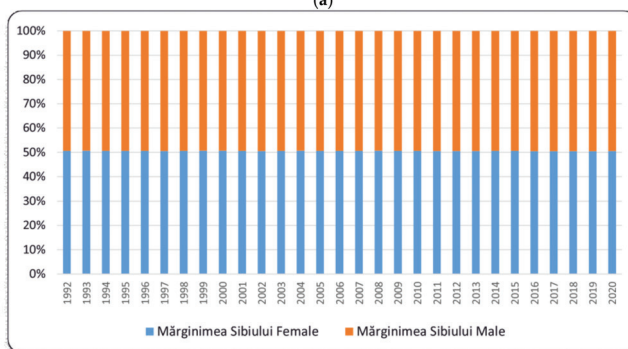
From the point of view of gender distribution (Figure 2b), the population of Mărginimea Sibiului is practically equally split, with a slightly higher presence of women (+0.58% in average, over the entire time span). Furthermore, the overall trend reveals an aging population for the investigated region (Figure 2c), with a higher life expectancy among women (Figure 2d). One ought to notice that over the past few recent years, younger generations tend to orient towards their home destination, but this trend has not yet been adopted by the generation of active adults.

In the current context of the COVID-19 pandemic situation, it becomes obvious that an analysis of the evolution of employment and unemployment rates at the county level and in Mărginimea Sibiului is necessary. With less than 15% of the region's population employed (full- and/or part-time), while the county-level percentage is double, the destination's sustainability becomes questionable (Figure 3a). Unemployment can and should be regarded in correlation with the increasing number of young people who opt to stay in their home region. Over the entire timeframe, the average unemployment rates registered in Mărginimea Sibiului (with Jina excluded due to its very high unemployment rates, in average of 7.3%) have been very close to the ones at the county level. In fact, the overall unemployment rates of the microregion have been and continue to be lower than those of Sibiu County (Figure 3b). Perhaps, a logical explanation can be provided by the intense tourism activity in the area. Regarding the situation of the employed and unemployed persons in tourism and hospitality services due to the COVID-19 lockdown in 2020, Mr. Roșu, the public manager of the Sibiu County Agency for Employment, estimated that more than 40% of the employees in businesses that provide tourism and hospitality services are seasonal workers (mainly university students and high-school pupils) who do not have any permanent/long-term contracts; thus, due to their flexible relation with their employers, they would return to their job positions once tourism activities restarted [81]. A monthly analysis of the number of unemployed persons in Mărginimea Sibiului reveals that there is no seasonality influence, with the figures remaining constant both in the case

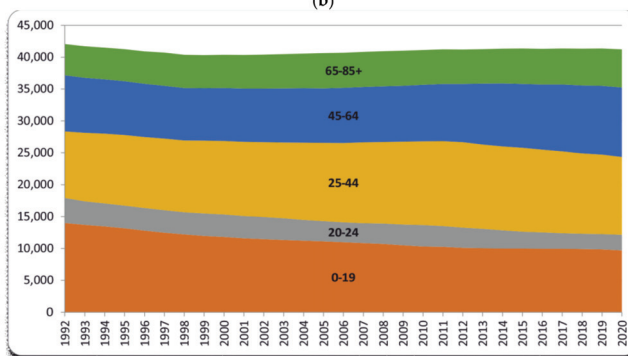
of females and males, following the trend of Sibiu County; in fact, during the summer there are slight decreases in terms of numbers of employed persons (Figure 3c).



(a)

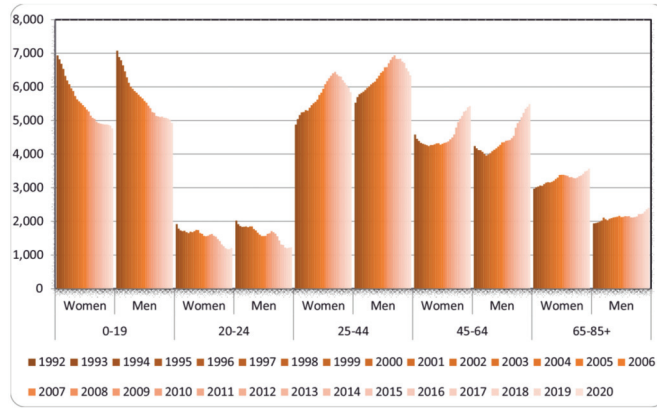


(b)



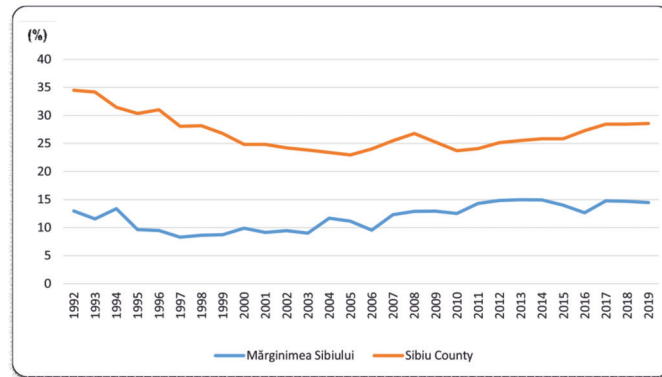
(c)

Figure 2. Cont.

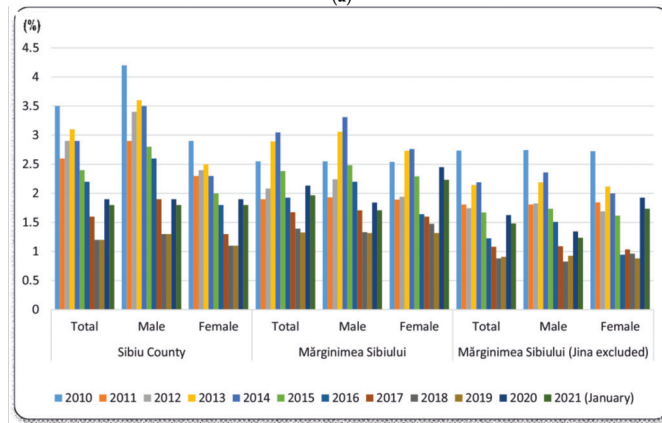


(d)

Figure 2. Population by permanent residence, as of January 1st (a); population by gender, as of January 1st (b); population, by age groups, as of July 1st (c); and gender distribution, by age groups, as of July 1st (d). Source: Authors’ processing based on NIS data [80].

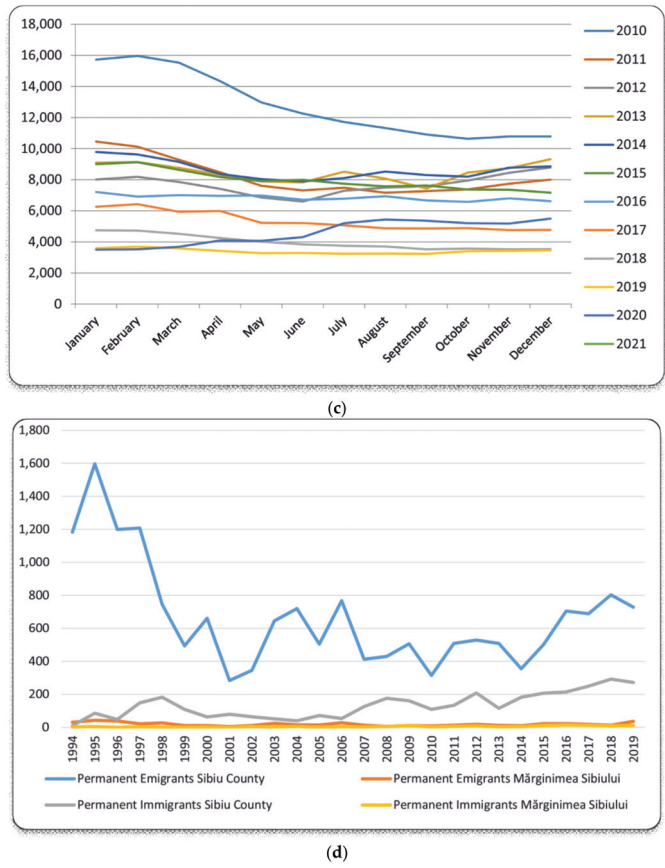


(a)



(b)

Figure 3. Cont.



**Figure 3.** Employees in total population (a); unemployment rates (b); unemployed persons, by month (c); and population migration (d) in Sibiu County and in Mărginimea Sibiului. Source: Authors' processing based on NIS data [80].

A positive aspect worth highlighting is the fact that the microregion Mărginimea Sibiului seems to manage to retain its population to a much higher degree compared to other destinations from Sibiu County, performing better than Saxon destinations, wherefrom many persons have migrated internationally over the past more than 30 years (Figure 3d).

### 3.3.2. Mărginimea Sibiului: An Analysis as Tourist Destination

For a better understanding of the context of rural tourism development in Mărginimea Sibiului, both the demand and the supply sides will be investigated. Furthermore, sustainability issues will be addressed.

As a rural tourism destination, Mărginimea Sibiului has known a quick development somewhat later than other Romanian rural destinations (Rucăr-Bran corridor, Bucovina and Maramures); thus, the first agritourist and rural guest houses were open here only in 2001, according to NIS data. In terms of numbers of accommodation units, Mărginimea Sibiului has registered an overall growth, following the trend of Sibiu County, with a decrease between 2011 and 2014, perhaps due to the economic crisis of 2008–2010. While in the early years after the fall of communism (1990–1996), Mărginimea Sibiului accounted for less than 15% of the lodgings in Sibiu County, beginning with 1997, and until 2004, Mărginimea Sibiului provided on average nearly 45% of the accommodation units in Sibiu County, to later drop to approximately 33% in average for the 2005–2010, and to eventually stabilize

around a quarter of the total available units between 2011 and 2020 (Figure 4a). In terms of types of units, it is obvious that in Mărginimea Sibiului, the supply of lodging services is mainly ensured by agritourist boarding houses and by some rural and urban guest houses. Unlike in other very popular and successful rural destinations, in both Sibiu County and Mărginimea Sibiului, according to NIS data (2021) the development of agritourist boarding houses and of urban and rural guesthouses only began in 2001. The rural tourism profile of the destination is clear. While at the beginning (in 2001) Mărginimea Sibiului concentrated over 75% of the lodgings in Sibiu County, indicating the fact that the microregion was among the initiators of rural tourism in the area, over the years, other destinations also developed and today it only accounts for a third of the county's supply (Figure 4b). The orientation of the locals towards developing facilities for rural and agritourism led to the emergence of a stable supply covering constantly around 15% of the county's available bed-places in all lodgings and initially (in 2001) of nearly 60% of the beds in agritourist boarding houses and rural and urban guesthouses, to account nowadays for a little more than a quarter of these structures' capacity (Figure 4c).

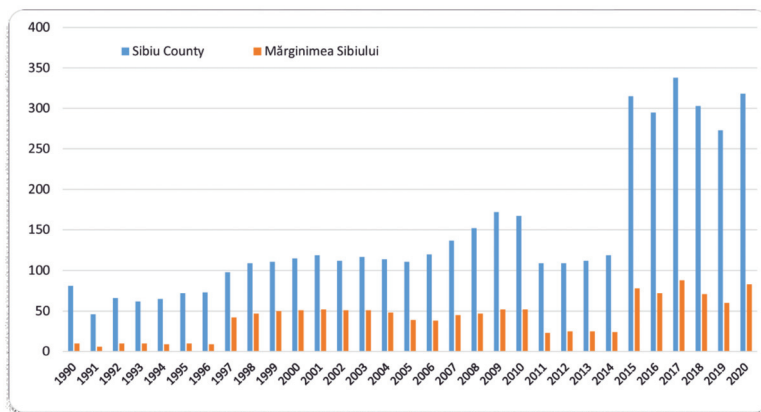
As expected, the functioning lodging capacity of Mărginimea Sibiului is dominated by agritourist boarding houses and rural and urban guesthouses. In terms of available functioning capacity, it accounts for less than 25% of the county's available beds in boarding houses and for a little more than 10% of the total functioning bed-places in the case of all lodgings from Sibiu County. A low seasonality can be observed, but overall, the provided available capacity is relatively stable throughout the entire year both for all types of lodgings and for boarding houses over the entire analyzed timeframe (2010–2021) (Figure 4d,e).

For a better assessment of sustainability issues, an in-depth analysis of the accommodation services is needed. Thus, relying on the collection of Authorized Lodgings provided by the Ministry of Tourism/National Authority for Tourism, the authors draw several concluding remarks concerning the supply side. Given the large volume of data, it has been decided to take the first available database (for 2000–2005) and to cross it with the ones published in 2010, 2015, 2016, 2020, and 2021.

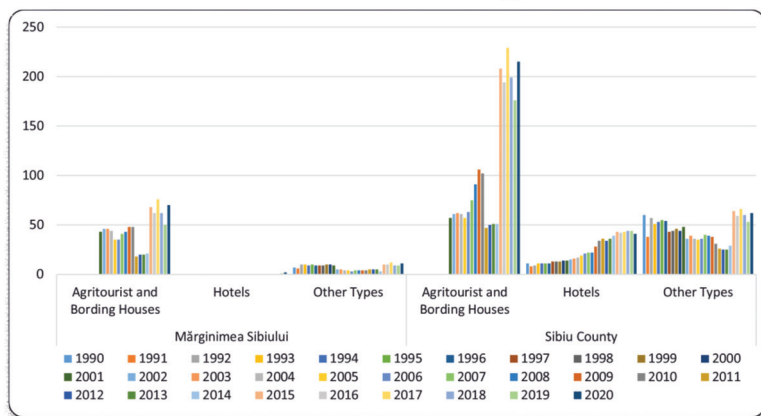
The same procedure has been adopted for foodservices; the first available database, in this case, is that from 2010. The last year has been selected in order to evaluate the impact of the first year of the COVID-19 pandemics upon the activity of hospitality players in Mărginimea Sibiului.

The reality of the lodging market reveals a significant number of small structures that are not taken into consideration by the National Institute of Statistics, which collects data only from lodgings with at least 10 beds. Thus, a very important market sector is completely ignored both in terms of assessing its size and in what regards tourist activity. Moreover, especially today, when both hosts and tourists face the challenges of the COVID-19 pandemic, small structures are very attractive and prove to be preferred by tourists. A synthetic situation of the development of lodging facilities in Sibiu County and in Mărginimea Sibiului is presented in Table 1, above, highlighting the fact that the investigated destination concentrates a large quota of the county's specific rural tourism supply (agritourist boarding houses, rural and urban (from small towns) guesthouses, and more recently of villas and rooms to let). Despite the worrisome times, investments in hospitality services continue to grow, entrepreneurs proving their positive thinking capacity. Furthermore, their attitude can be associated with their understanding of the great potential of community-based tourism development [82,83] and of the attractiveness of small lodgings in this context as well.

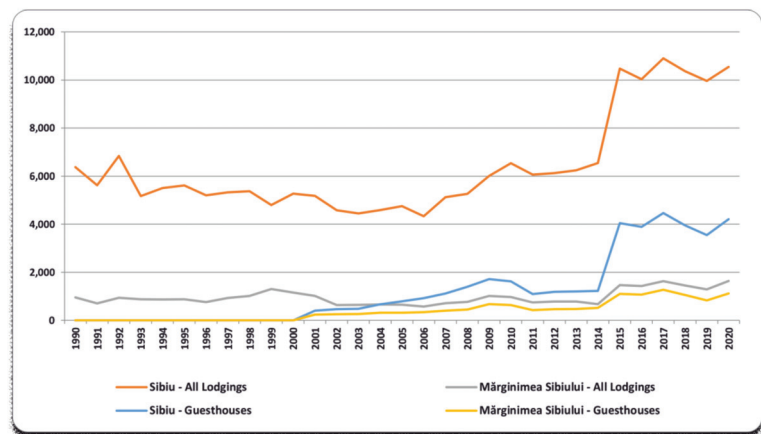




(a)

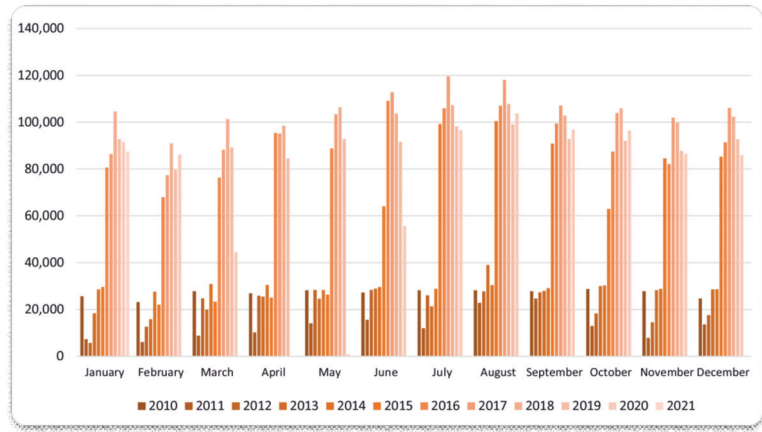


(b)

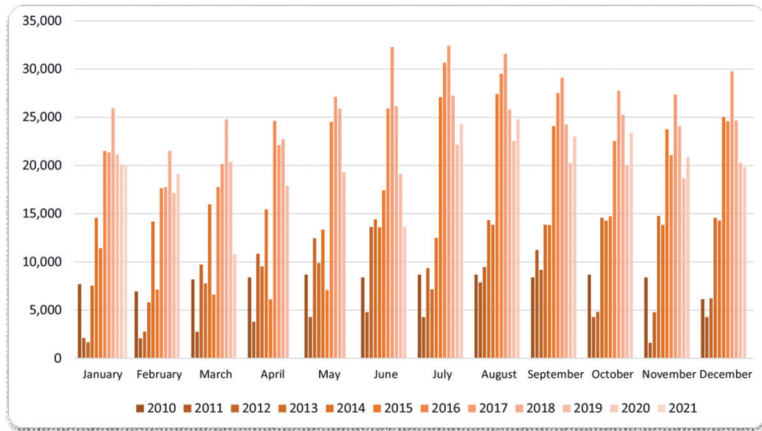


(c)

Figure 4. Cont.



(d)



(e)

**Figure 4.** Development of accommodation services in Sibiu County and in Mărginimea Sibiului; number of lodgings (a); number of lodgings by type (b); total existing lodging capacity (c); total functioning lodging capacity (d); and monthly functioning lodging capacity (e). Source: Authors’ processing based on NIS data [80].

As anticipated, the supply of accommodation services from Mărginimea Sibiului is clearly dominated by agritourist boarding houses cumulated with rural and urban (from the small towns included in the microregion) guesthouses. Overall, the development of lodging services in the area indicates an orientation of the owners and/or managers towards relatively small structures that capitalize on the destination’s potential. The more recent development of chalets, villas and rooms to let and/or apartments is consistent with the destination’s profile but also reveals a lack of understanding, among investors, that guesthouses have proven to be the region’s key to success (Figure 5a). The growth trend has been registered both in terms of rooms and of available beds, knowing an alert pace (Figure 5b). A significant change in terms of size can be observed over the first 10 years of activity. This indicates a constantly growing demand and, therefore, a higher interest towards hospitality business development among the local population. No other significant size changes have been registered after 2015 (Figure 5b,c).

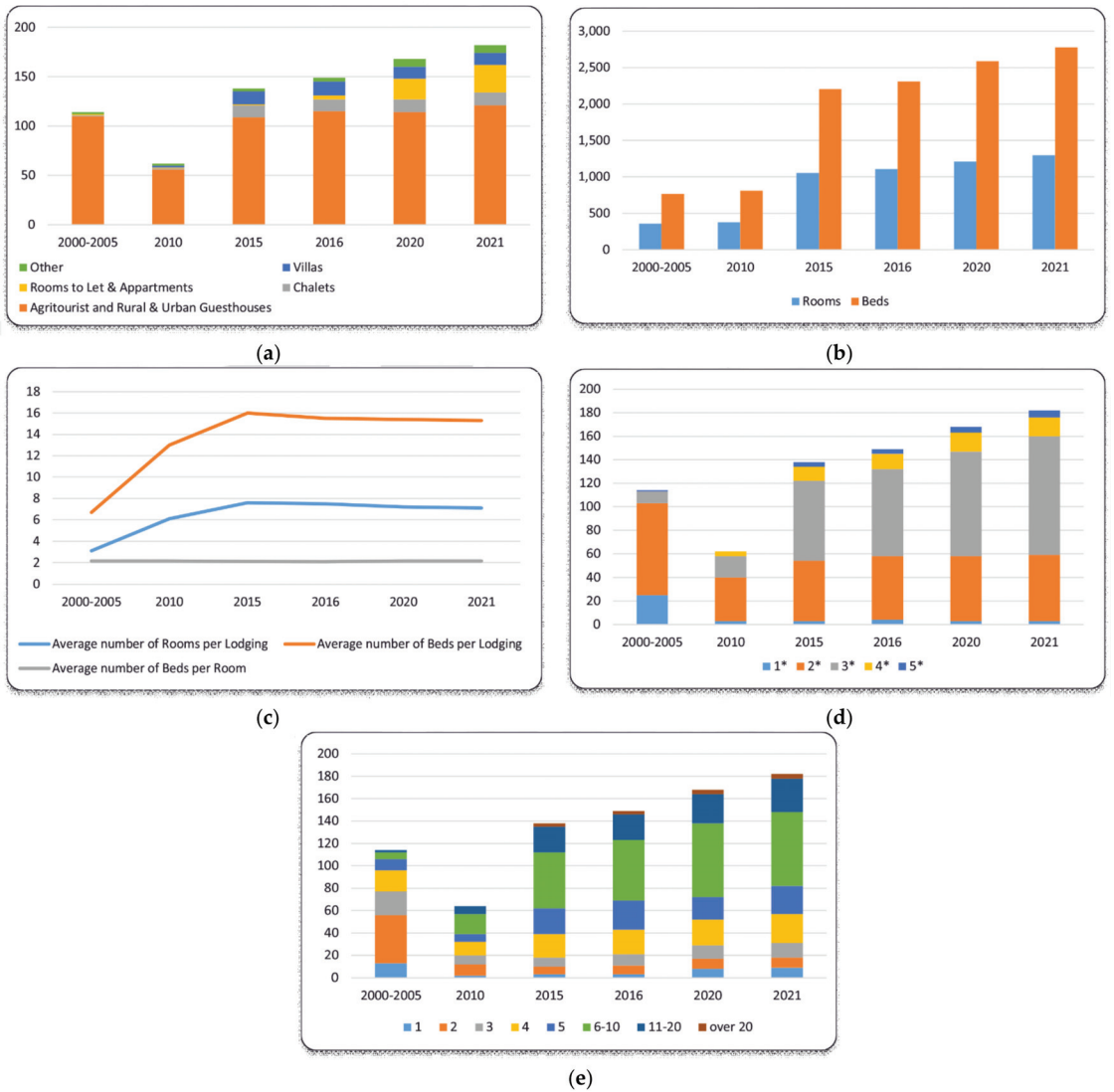
**Table 1.** Authorized Lodgings in Mărginimea Sibiului and Sibiu County.

Year	Total Lodgings	Agritourist and Rural & Urban Guesthouses	Chalets	Rooms to Let & Appartements	Villas	Other	Rooms	Beds
<b>Mărginimea Sibiului</b>								
2000–2005	114	110	1	1	0	2	357	766
2010	62	56	1	1	2	2	377	811
2015	138	109	12	1	13	3	1054	2203
2016	149	115	12	4	14	4	1109	2310
2020	168	114	13	21	12	8	1208	2587
2021	182	121	13	28	12	8	1296	2777
<b>Sibiu County</b>								
2000–2005	265	202	4	11	8	40	2379	4908
2010	254	166	7	17	8	55	3523	7255
2015	454	276	22	44	34	78	5587	11,998
2016	485	295	22	54	35	79	5784	12,394
2020	600	314	23	134	40	89	6584	14,165
2021	705	337	25	210	43	90	6866	14,925

Source: Authors' processing based on National Authority for Tourism (NAT) data [80].

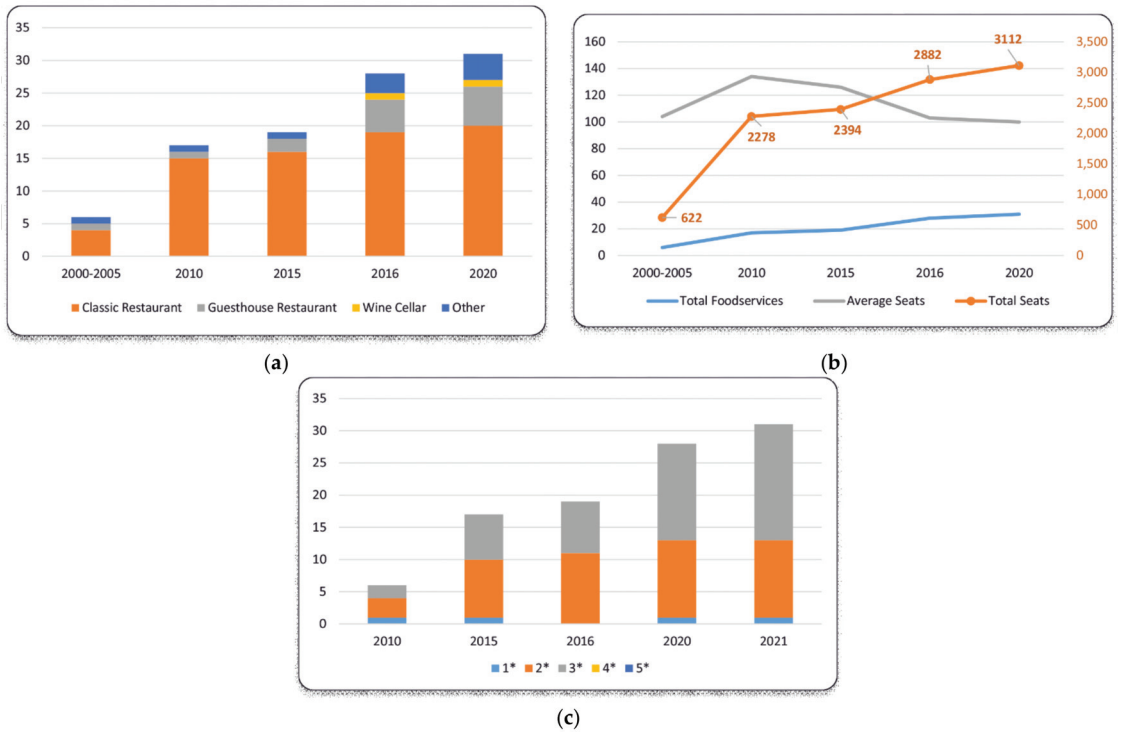
Concerning the provided accommodation services' quality and level of comfort, one ought to notice the significant shift from a predominantly low ranking (of one and, mainly, two stars and daisies, with very few units ranked at three stars/daisies), to a supply consisting of mainly three-star/daisies units, followed by two-star ones but also with developing four- and five-star segments (Figure 5d). The providers of accommodation services undertook changes in their facilities' structures as well. While the supply was initially dominated by two-room structures—followed by units with three or four rooms, respectively, even one room—beginning with 2010 they began to extend their properties. Still, even today, the offer of lodging services in Mărginimea Sibiului is dominated by relatively small units, being equally split between facilities with one to five rooms and 6 to 10 rooms, which can still provide intimacy and a nice interaction with the host, not losing in terms of hospitality spirit (Figure 5e).

Regarding the foodservices provided in the investigated microregion, one can easily notice several aspects. While in the case of accommodation services entrepreneurs seem to have understood that their decision of investing in specific facilities (agritourist boarding houses and rural and urban guesthouses) has contributed to the destination's success, they seem to have failed to assess the potential of providing foodservices through specialized restaurants and through locally specific restaurants (Figure 6a). Their option to open almost exclusively relatively large classic restaurants instead of orienting towards smaller scale but diversified units indicates that they rather count on the local population, trying to capitalize on the locals' needs to also organize large events (such as weddings, baptisms and other private or public events), failing to understand that today's tourists are extremely attracted by gastronomic experiences (Figure 6b). A discrete but very slow diversification of the provided foodservices seems to take place. The presence of coffee-bars and of a wine cellars suggests the beginnings of change, but the destination must continue to work in this direction. Furthermore, an improvement of the provided services' quality is also needed because the domination of two-star structures is not satisfactory for a Gastronomic Destination of Europe (Figure 6c).

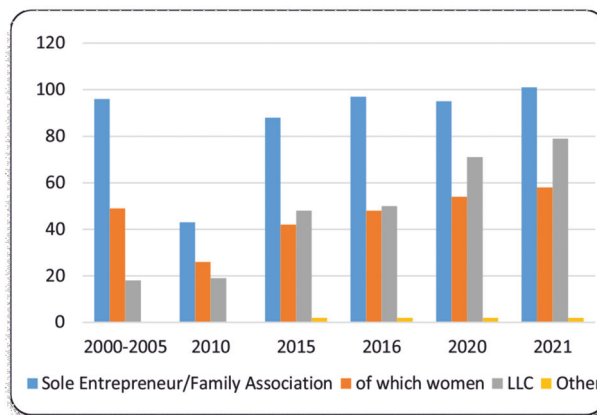


**Figure 5.** Accommodation units, by type (a); accommodation capacity (b,c); lodgings, by level of classification (d); and size of lodging, by number of rooms (e). Source: Authors’ processing based on National Authority for Tourism (NAT) data [80].

As expected, the large majority of the enterprises are family businesses (Figure 7). A pleasant surprise was to learn that more than half of the individual entrepreneurs are women. Moreover, when analyzing the units’ names, the quota of businesses operated by women increases to more than two thirds. The same is valid for foodservice units, too. In fact, most of these ones are actually associated to lodging services. There are very few independent or self-established restaurants in the area. Another positive aspect is that over the analyzed time span, more than two thirds of the lodgings open between 2000 and 2005 continue to function today, most of them being operated by their initial owners. Most of those that have disappeared have done so before 2010. Furthermore, only six of the lodgings established in 2010 seized to function.



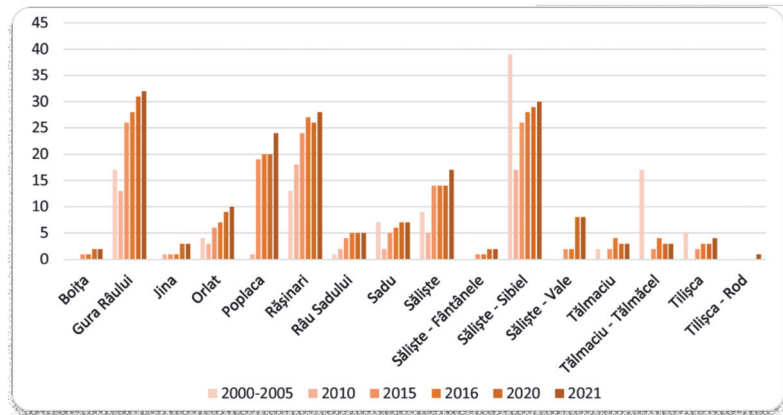
**Figure 6.** Development of Foodservices in Mărginimea Sibiului: foodservices, by type (a); food-serving capacity (b); and foodservices level of classification (c). Source: Authors’ processing based on National Authority for Tourism (NAT) data [80].



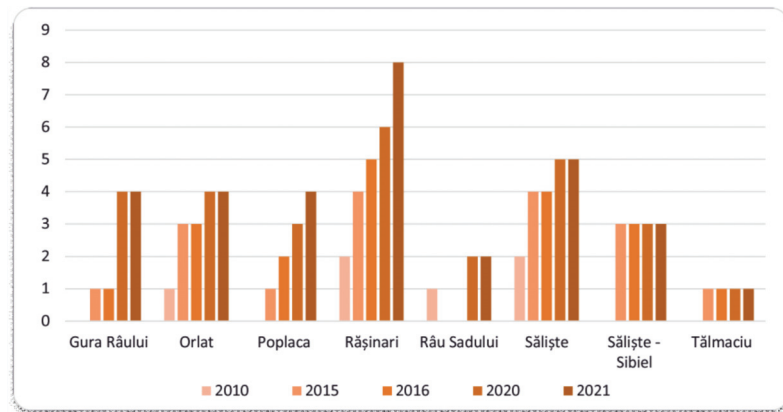
**Figure 7.** Entrepreneurial profile. Source: Authors’ processing based on National Authority for Tourism (NAT) data [80].

Another positive aspect is the fact that the development of both lodgings and foodservices has meant not only a growth in terms of numbers and available places but also a spread-out on the destination’s territory. Thus, today, 16 of the 18 localities comprised by Mărginimea Sibiului provide accommodation services (Figure 8a), but only eight of these

localities can also serve their visitors with food (Figure 8b). It is clear that from an investor’s point of view, there is space for capitalizing on the destination’s gastronomic heritage.



(a)



(b)

**Figure 8.** Entrepreneurial profile: lodgings (a), and foodservices (b) per destinations (number). Source: Authors’ processing based on National Authority for Tourism (NAT) data [80].

#### 4. Conclusions

The study outlines Mărginimea Sibiului as a distinct tourism destination in Romania in what regards rural tourism and agritourism as components of sustainable tourism in this region. The diversity of tourism potential given by the gastronomy and cultural traditions in this area emphasize the destination’s uniqueness and the tourist identity that has been shaped over time, hence being also known for its natural resources. The endowment of territory with many accommodation facilities ascertains the attractiveness of the region and the increasing number of domestic and foreign tourists.

The research limits must be outlined as deriving from the fact that the present paper does not benefit from the increased added-value of field research and of interviews with the destination’s stakeholders, especially of a quantitative research of the demand-side. As the authors have explained, these shortages are going to be compensated in the coming papers that will address the missing aspects based on the findings of the present paper.

The analysis of the economic development of the destination places Mărginimea Sibiului in a relatively good position, with a stable population that is equally divided between gender. The trend reveals a somewhat aging population but also a good presence of youth. Still, at the same time, a diminishing tendency among young active adults is visible. Sustainable development seems to be challenged by the low quota of the (full- or part-time) employed persons, corroborated with the migration trend of the young generations. On the other hand, unemployment is at normal levels, perhaps due to the intense tourism activity in the area. Although present, migration from the destination's communities is not as high as in the case of Sibiu county.

The tourist destination has developed a bit later than other important Romanian destinations (Rucăr-Bran corridor, Bucovina and Maramureş). Initially it was Sibiu county's most significant contributor in terms of lodging services (accounting for nearly 45% of the lodgings), while today it provides a quarter of the total numerical supply. With more than two thirds of the initially established lodgings in the early 2000s continuing to function today, these facilities have proven to be sustainable and attractive businesses, contributing to the locals' employment and wellbeing. Another fact worth mentioning is the consistency in terms of lodging facilities' development and destination profile. Thus, the destination's supply is clearly dominated by agritourist boarding houses and rural guesthouses, which account for a quarter of Sibiu county's total bed-places-offer and of only a tenth of its functioning capacity. The latter aspect can be regarded as a threat for the destination's sustainable development, but, at the same time, it should be regarded as a clear sign that a diversification of leisure services is needed, which would eventually provide more business opportunities because seasonality does not seem to negatively affect the destination. The analyses of the lodging supply revealed that the authorized facilities (not entirely caught in the national statistics) comprise a significant quota of small structures, which are in fact gaining popularity in today's epidemiologic context. Furthermore, these structures are attractive for entrepreneurs, who, despite the pandemic situation, continue to establish and open new facilities. Overall, the evolution of the lodging services in the area points towards the preference of the owners and/or managers for relatively small structures that truly capitalize on the destination's potential, like agritourist guesthouses and rural boarding houses, with improved rankings. There are some exceptions, namely the cases of some investors who do not seem to understand that diversification is not needed in the supply of lodging services—agritourism and rural tourism specific facilities being the winning card—but in that of the supply of food and leisure services.

From the point of view of the hospitality services provided in the area, the main findings indicate an overall growth of small lodgings and the improvement of the services they provide by upgrading the lodgings to superior ranking levels. While the beginnings of agritourism and rural tourism in the destination are associated with timid initiatives, ranked low, the 2010 database comprises more than three fourths of the initial lodgings, of which more than a half had been reauthorized and registered at a higher ranking. This suggests, in fact, that locals have assessed the potential of tourism related businesses and that they have understood that the provision of decent services from a qualitative point of view increases their destination's attractiveness; thus, their main focus seems to be the provision of lodging services with good value-for-money. A highly encouraging fact is that despite the difficulties determined by the COVID-19 pandemic, this year indicates the maintenance of the investors' interest towards the hospitality sector, with a growing trend of small lodgings, particularly rooms to let and apartments for rent. This novel orientation suggests the desire of the entrepreneurs to capitalize on the tourists' current needs, namely, to travel and accommodate, under safe conditions, thus turning towards smaller scale lodgings, in the countryside, where they are provided intimacy and sufficient social distance.

On the other hand, the analyses also indicated that two areas are not yet properly covered by the local business-persons, namely foodservices and travel services. Thus, the authorized supply of foodservices is still very underdeveloped, not diversified, and fails to

contribute to the region's differentiation as a tourist destination. Specialized restaurants and restaurants with local and national specificity are practically missing from the local market's offer. The situation is very odd as long as Mărginimea Sibiului seems to fail to capitalize on its statute of gastronomic destination of Europe.

Furthermore, travel agencies are practically absent from the region. Despite its positive image both in Romania and abroad, Mărginimea Sibiului does not benefit from an appropriate destination management. There has not yet been established a destination management organization (DMO) for the area, nor has one been developed for Sibiu County. Only three localities have tourist information centers (TICs): Rășinari (since 2010), Săliște (since 2013), and Tâlmaci (since 2020). Many things can and should be done in the region in this respect.

Another interesting finding of the desk analyses is the entrepreneurial profile of the players in the hospitality sector of the destination under scrutiny. Thus, from the point of view of sustainable development, it may be considered that having largely opted for the opening and management of lodgings but also of foodservices under sole entrepreneurship solutions as well as having massively chosen legal forms, such as authorized person, family association, individual enterprise, or family enterprise, indicates the entrepreneur's desire to provide for his/her family and to increase their wellbeing. The promotion of agritourism and rural tourism in Mărginimea Sibiului creates opportunities for local and regional economic growth; it also helps create new jobs through harnessing the specific cultural and natural heritage. Moreover, the diversity of accommodation services creates new opportunities for the employment of youth from the region and has proven to be a female-coordinated activity.

This is another sector worth exploring for local entrepreneurs because the region presents a large variety of attractions and very diversified leisure opportunities which have great potential to be integrated into successful travel packages. Given the high notoriety of the area at the international level, there are plenty of business opportunities for incoming travel services.

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Article

# Resilient Rural Areas and Tourism Development Paths: A Comparison of Case Studies

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**Abstract:** In the settlement network of Italian small towns (the so-called “borghi”, with a population ceiling lower than 5000 inhabitants), not lacking in discontinuities and patches, a “common thread” is increasingly noticeable, which allows to look optimistically beyond several weaknesses (economy depending on a relatively unprofitable or declining agriculture, social and economic stasis, demographic decline and consequent contraction of public and private services, hydrogeological instability, etc.): we are talking of the firm, pigheaded determination of an increasing number of local communities to become sustainable and responsible realities, get involved, and undertake a process of “hot authentication” of their *milieu*. Since 2013, such resilient attitude is at the heart of the National Strategy for Inner Areas (SNAI, Strategia Nazionale per le Aree Interne) aimed at promoting coordinated, multi-scalar projects of self-enhancement; in April 2019, the above innovative form of territorial planning was selected by the European Parliament as a model for the 2021–2027 programming period of the European Regional Development Fund (ERDF). This paper reviews the original and creative bottom-up enhancement process being implemented in several towns of the “Monti Dauni” sub-region, a pilot marginal area identified by Apulian regional authorities within the SNAI. In these small towns, local players aim at maximizing the opportunities of sustainable, experiential tourism by offering an uncontaminated environment, ancient knowledge, genuine flavours and deep emotions to all visitors who wish to achieve a deeper knowledge of the territorial identity instead of being mere spectators, by adopting an active and engaged attitude.

**Keywords:** marginal areas; National Strategy for Inner Areas (SNAI; Strategia Nazionale per le Aree Interne); sustainable local development; experiential tourism



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## 1. Introduction

The long-standing issue of Italian inner areas lack of development has been periodically debated by the scientific and political community.

In Italy, inner areas are territories significantly distant from key welfare services (health, education, and mobility) but, at the same time, they are characterized by a huge amount of territorial capital in terms of environmental and cultural resources, highly diversified in nature and as a consequence of anthropization processes [1].

These areas represent the 60% of the whole national territory, organized in 4000 municipalities of small-medium size (the majority of borghi, small towns up to 5000 inhabitants, are located in inner areas) and host one-quarter of the Italian population [2].

The one above is a functional, political–strategic definition, which inspired the outlining of the National Strategy for Inner Areas (Strategia Nazionale per le Aree Interne, from now on SNAI). However, it is in turn the result of a rooted scientific debate about the essential features of these territories, as well as their intrinsic dynamics.

For a long time, such a debate was driven by an historical approach, aimed at a better understanding of the origins of Inner Areas: these can be traced to the 1950s, when Italian

national development strategies were largely inspired by growth pole models. The main spatial effect was an increasing gap between industry-driven territories and, in a second phase, also tourism-driven-, mainly located in lowlands and coastal areas, and rural areas. The latter, for decades, served as a reservoir of resources and labour for developed areas, and progressively faced heavy depopulation, loss of biodiversity and cultural heritage, and environmental degradation.

The following resurgence of diseconomies of agglomerations within the growth poles are the reason for a rediscovery, during the nineties, of local dimension: both policymakers and scholars look at those which had been known as “marginal” areas as a valid alternative for a new idea of development. Hence, it is self-evident that inner areas are far from being just peripheral areas: on the contrary, they resemble an extremely varied scenario, characterized by heavy threats but, at the same time, gifted with a meaningful territorial potential.

The analysis of the causes of their progressive decay and, therefore, the possible remedies, followed historically at least three approaches. The so-called “conservative” one, suggested keeping a minimum level of services for the population in order to discourage the abandonment. With the second approach, the “compensatory” one, the definitive departure of traditional residents was accepted but measures were put forward to attract new ones. The third approach, the “multifunction” one, derived by the overlapping of the concepts of inner area and rurality, both expressing territorial marginality. “However, the (structural) marginality is indeed connected to rurality: actually, it can be sufficiently proven that most of the rural areas where agriculture plays a dominant (though weak) role and featuring a low economic and social level, much lower than urban and industrial areas, are to be considered marginal areas” [3]. The “multifunction” approach suggested the integration of the specific production targets of the usual agricultural activity of the concerned areas, with more innovative ones, related to the increasing demand of suburban social spaces, such as those related to tourist accommodation offerings, and the sale of typical and/or food and wine products. Notwithstanding several measures put forward by different successive governments, the situation of inner areas still shows, in some cases, marginality features, though with differences across each territory. Further, the economic and financial crises of recent years, increased the challenges of weaker areas such as, for example, the Appennini or, more in general, southern Italy. Given the above, it is more necessary than ever to reconsider a new development model mainly driven by the recovery of such disadvantaged areas, better known as “inner areas”.

This paper, after introducing the main features of the new approach followed by the National Strategy for Inner Areas (SNAI) reviews the original and creative bottom-up enhancement process being implemented in several towns of the “Monti Dauni” sub-region, a pilot inner area identified by Apulian regional authorities within the SNAI. Within these small towns, following the established principles of sustainability and social cohesion [4], local players aim at maximizing the opportunities of sustainable, experiential tourism by offering an uncontaminated environment, ancient knowledge, genuine flavors, and deep emotions to all visitors who wish to achieve a deeper knowledge of the territorial identity instead of being mere spectators, adopting an active and engaged attitude.

## 2. The New Multi-Scalar Approach of the National Strategy for Inner Areas in Italy

For many years, at first in the scientific then in the political context, the question has been raised about the meaning of inner areas in order to define and include them in the accompanying measures for the development. After a long series of interventions focused on cities as driving centres of development, for more than twenty years Geography has been trying to “explore the role played by some inner areas within the process of territorial change” [5] (p. 7). This new research stage was firstly focused on southern regions seen as part of a more structured process for the revalorisation of those areas of the country lagging behind in terms of development and considered marginal [6]. Starting from the period after the Second World War, State interventions had been dictated rather

by emergencies (Cassa per il Mezzogiorno) or contingencies of specific cases (earthquakes and/or other natural disasters), than by the planning of structural and specific measures designed for marginal areas. Therefore, such interventions, had not created a new consistent economic structure. In particular, concerning inner areas, Coppola wrote: “once again, the core of Mezzogiorno, defined as a number of inner and less accessible areas, not only for their position and physical connections but also—and often, above all—in terms of social distance and cultural attitudes, has remained in shade” [7] (p. 4). Afterwards, scholarly focus expanded to include the rest of Italy, in the conviction that the marginal nature, typical of the southern core, was a common feature of all the inner areas [8–11] and that the analysis should be expanded, therefore, to the whole national territory.

The acknowledgement of the lagging condition of the country’s inner areas leads the Government to promote a plan for their relaunch. Thus, since 2013, a national strategy coordinated by the Prime Minister’s Office has been implemented, called National Strategy for Inner Areas (SNAI), concerning 72 “project areas” in all the Regions and in the Autonomous Province of Trento, selected through indicators related to the access to health services, collective mobility and education. The municipalities involved are 1066 on the 16.7% of the country’s area, with about 2.1 million inhabitants equal to 3.5% of the national population [2].

The urgent need of government action is confirmed by several considerations: inner areas represent a large part of the country—about three fifths of the territory and little less than a quarter of the population—highly diversified internally, far from big agglomeration and service centres and with unsteady development trajectories, and yet endowed with resources lacking in central areas, with demographic issues but also strongly polycentric and with a high potential for attraction. The SNAI defines them as those parts of the national territory affected by population decrease or ageing and in which the weak development prospects lead to increasing difficulty in the living conditions of their inhabitants [2]. In its National Reform Programme (NRP), a document annually defining for each EU Member State the measures to be adopted in order to achieve the national targets in terms of growth, productivity, employment, and sustainability set by the Europe 2020 strategy [12], Italy adopted a strategy aiming to counteract the demographic decline and relaunch the development and the services of those areas through the regular lending of the Stability Law and EU funds. Together with the *Politiche per le Città* (Urban Policies) the SNAI represents the backbone of the territorial planning defined by the Italian Government in the 2014–2020 programming cycle. In order to guarantee the effectiveness and sustainability over time of the above strategy, in line with the Partnership Agreement for the use of structural funds allocated to Italy for the 2014–2020 programming cycle, in the Stability Law of 2014 (Articles 13 and 17) [13] an expenditure of EUR 3 million for 2014 and EUR 43.5 million for each of 2015 and 2016 was authorised, to be financed by the Revolving Fund. The resources are allocated for the financing of pilot interventions to rebalance the basic service offer in the country’s inner areas, with a focus on transport, education as well as social and health services. By September of each year, the Minister for Territorial Cohesion submit to CIPE (Comitato Interministeriale per la Programmazione Economica) the results of the actions carried out, for the purposes of the refinancing assessment for the following year. Italy adopted this strategy to counteract the demographic decline and relaunch the development and services of those areas by allocating about EUR 180 million of national funds, in addition to regional funds from programmes financed through European funds. To achieve these goals, the strategy foresees two converging lines of action: one, aimed at driving the local development through projects funded by the available European regional funds (ERDF Regional Operational Programme, ESF Regional Operational Programme, and Rural Development Programme); the other, aiming to provide to the same areas suitable levels of citizenship in some essential services (health, education, and mobility). The latter category of actions received an overall national allocation of EUR 90 million within the Stability Law of 2014, to support interventions in the first 23 pilot areas, and additional EUR 90 million are planned for the three-year period 2015–2017. The entity coordinating

the National Strategy for Inner Areas is the Committee for Inner Areas (CAI, Comitato Aree Interne) a national body that interfaces with Regions and the selected pilot areas.

The SNAI combines to Law No. 158/2017, “Measures for the support and the enhancement of small towns, as well as provisions for the revitalisation and recovery of their historic centres” [14], with an allocation of EUR 100 million for the 2017–2023 period. The resources are also intended to finance investments for the protection of the environment and cultural heritage, the mitigation of the hydrogeological risk, the safety of road infrastructure and schools, the establishment of new production activities; as well as the design and implementation of the national network of tourist cycle routes and safety interventions for urban traffic. Beneficiaries of the initiatives are the towns with less than 5000 inhabitants, located in concerned areas characterised by hydrogeological instability, decrease of resident population, settlement unease, inadequacy of essential social services. The Italian towns meeting the above criteria are 5591, or 70% of the total national number.

Geographically, it is interesting to notice how one of the main strengths of the SNAI is its being a successful example of placed-based local development policy. Indeed, SNAI adopts a mixed top-down/bottom-up approach, aiming to systemize all the financing measures available in the “project areas”, fostering both the vertical and horizontal co-operation; the multi-scalar structure is functional to achieve a local development process on an endogenous and self-centered basis, within an empowering framework created by supra-local measures.

As a planning tool, SNAI is an expression of a political-strategic dimension according to which the development of Inner areas represents a priority in the Italian political agenda, also due to the territorial and demographic size of the phenomenon. Throughout the whole document and the implementation processes it is possible to recognize an evolutionary approach, based on the definition of a shared territorial vision to drive and inspire local stakeholders.

If, on one hand, this could bring territories to develop a sort of performative attitude, in order to put national and super local instructions into practice, on the other hand the way through which each territory assimilates such an input depends on their specific autopoietic territorial capital, namely, that set of site-specific features through which local stakeholders rework external inputs and adapt them to the milieu.

For these reasons, in the next paragraphs, along the presentation of Monti Dauni as a paratactic space [15] outlined by the political action, we deal with the results of direct and indirect observation of some of its sub-areas which we consider as proactive, relational spaces [16,17] where situated practices take place. Such practices are preexistent to SNAI, and can suggest interesting development trends to the whole pilot area

### 3. The Monti Dauni As SNAI Pilot Area: Overview

Little more than 56,000 inhabitants on about 2000 square km of gently sloping clay hills, “often carved out by deep torrential valleys, partly faulted or extensively ripped apart by erosion processes” [18] (p. 12), framing the Tavoliere di Puglia to the West and South-West and rarely exceeding 1000 m a.s.l. (the maximum altitude is that of Monte Cornacchia—1151 m a.s.l.): this is the loose anthropic fabric of the Monti Dauni (in the past often referred to in several geographical essays as “Subappennino Dauno”) [19–23]. It is composed of 29 municipalities spread over two rows of topmost villages similar to lonely “Nativity scenes” [24] (p. 34). These little towns gradually depopulated since 1950s [23] (p. 509) [25] (p. 9), confirming the poor demographic endowment of the sub-region starting from the first years of 1900 [26] Table 1.

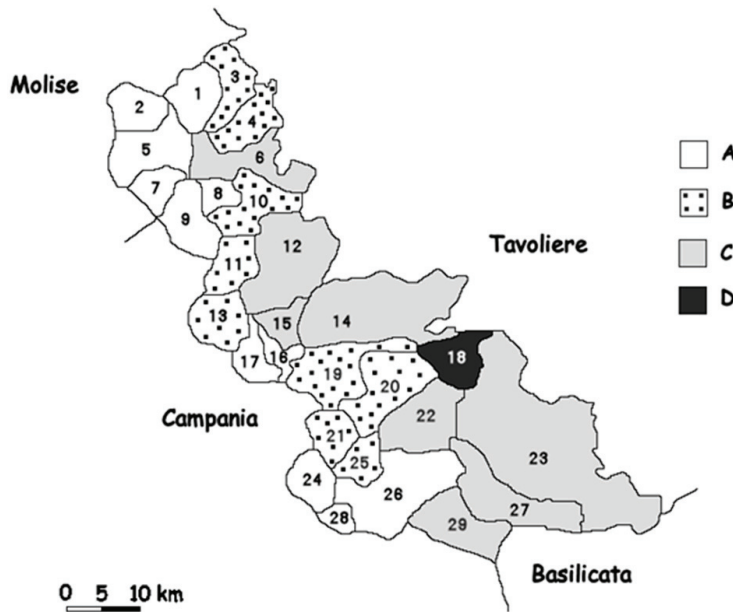
**Table 1.** Monti Dauni: altitude, area, and comparison of demographics 1991/2019 (Source: our processing of ISTAT data).

	I	II	III	IV	V	VI	VII	VIII	IX
MUNICIPALITIES	m a.s.l.	sq. km.	pop. 1991	pop. 2019	inh./sq. km. 1991	inh./sq. km. 2019	(IV–III)/III %	% > 75 years old 1991	% > 75 years old 2019
Accadia	650	30.48	3107	2277	101.94	74.70	−26.71	10.7	13.2
Alberona	732	49.25	1269	902	25.77	18.31	−28.92	11.6	18.6
Anzano di Puglia	760	11.12	2365	1185	212.68	106.56	−49.89	7.4	14.8
Ascoli Satriano	393	334.57	6892	6102	20.60	18.24	−11.46	6.6	10.6
Biccari	450	106.31	3462	2696	32.57	25.36	−22.13	7.9	16.8
Bovino	620	84.16	4546	3138	54.02	37.29	−30.97	10	16.9
Candela	474	96.14	2809	2732	29.22	28.42	−2.74	8.3	10.6
Carlantino	558	34.17	1449	916	42.41	26.81	−36.78	6.8	16.1
Casalnuovo Monterotaro	432	48.17	2370	1434	49.20	29.77	−39.49	12.1	16.8
Casalvecchio di Puglia	465	31.70	2410	1763	76.03	55.62	−26.85	6.8	14.3
Castelluccio dei Sauri	284	51.31	1900	2097	37.03	40.87	10.37	7.4	10.3
Castelluccio Valmaggiore	630	26.66	1552	1253	58.21	47.00	−19.27	10.1	18.4
Castelnuovo della Daunia	543	60.99	1991	1359	32.64	22.28	−31.74	9.6	15.9
Celenza Valfortore	480	66.48	2299	1485	34.58	22.34	−35.41	10.7	28.2
Celle di San Vito	726	18.21	297	164	16.31	9.01	−44.78	14.1	21.3
Deliceto	575	75.63	4304	3671	56.91	48.54	−14.71	9.8	12.5
Faeto	820	26.16	1010	614	38.61	23.47	−39.21	13.6	11.1
Monteleone di Puglia	842	36.04	1608	977	44.62	27.11	−39.24	13.2	12.3
Motta Montecorvino	662	19.7	1159	682	58.83	34.62	−41.16	13.5	23.6
Orsara di Puglia	635	82.24	3530	2604	42.92	31.66	−26.23	9.9	17.6
Panni	801	32.59	1083	740	33.23	22.71	−31.67	15.8	21.6
Pietramontecorvino	456	71.17	3111	2612	43.71	36.70	−16.04	10.1	14.7
Rocchetta Sant'Antonio	633	71.9	2293	1767	31.89	24.58	−22.94	9.5	15.5
Roseto Valfortore	658	49.61	1513	1054	30.50	21.25	−30.34	18	17.7
San Marco la Catola	683	28.4	1794	925	63.17	32.57	−48.44	9.6	17.8
Sant'Agata di Puglia	794	115.79	3049	1886	26.33	16.29	−38.14	12.9	15.2
Troia	439	167.22	7898	6985	47.23	41.77	−11.56	6.8	12.7
Volturara Appula	526	51.87	744	397	14.34	7.65	−46.64	18	23.8
Volturino	735	58.02	2224	1654	38.33	28.51	−25.63	9.1	27.2
TOTAL		1936.06	74,038	56,071	38.24	28.96	−24.27	9.6	14.4



In the face of the unrelenting long-term *dissipating capitalization* [27] (p. 316) in process, characterized by the depletion of physical components (hydrogeological instability, stream overflow, and deforestation) as well as anthropic ones (“angry” migration [21] (p. 172)—abandonment of built-up areas, population ageing, and decrease of traditional directly managed agricultural activities—mainly extensive cereal production and sheep farming), Mannella [18] in 1990 wrote that “by paraphrasing Banfield [28], the image offered by the population does not look like a community’s one, that is a significant social structure, but a mere aggregation of families within the boundaries of a geographical area” [18] (pp. 27–28), unable to stop the decline of the “uprooted” mountain.

The 1991–2019 period confirms the trend strengthened in the previous decades: indeed, ISTAT data show a decrease in the population from 74,038 to 56,071 inhabitants (−24.27%), more than halved compared to the anthropic coverage surveyed in 1961. The demographic decrease concerns the whole area, with only the exception of Castelluccio dei Sauri (+10.37%) and, above all, the innermost and/or higher towns (Anzano di Puglia: −49.89%; San Marco la Catola: −48.44%; Monteleone di Puglia: −39.24%; Faeto: −39.21%) (see Table 1; Figure 1). The settlement system, almost devoid of population, scattered in the countryside [14], has only four towns with more than 3000 inhabitants (Ascoli Satriano: 6102; Bovino: 3138; Deliceto: 3671; Troia: 6985) and is scattered in 15 villages with less than 1500 inhabitants, including Celle di San Vito, the smallest Apulian municipality (164 inhabitants).



**Figure 1.** Monti Dauni: percentage change of inhabitants in the 1991–2019 period (our processing of ISTAT data). (A: > −35%; B: between −35% and −24.27%; C: between −24.27% and 0; D: positive percentage changes). (1: Casalnuovo Monterotaro; 2: Carlantino; 3: Casalvecchio di Puglia; 4: Castelnuovo della Daunia; 5: Celenza Valfortore; 6: Pietramontecorvino; 7: San Marco la Catola; 8: Motta Montecorvino; 9: Volturara Appula; 10: Volturino; 11: Alberona; 12: Biccari; 13: Roseto Valfortore; 14: Troia; 15: Castelluccio Valmaggiore; 16: Celle di San Vito; 17: Faeto; 18: Castelluccio dei Sauri; 19: Orsara di Puglia; 20: Bovino; 21: Panni; 22: Deliceto; 23: Ascoli Satriano; 24: Monteleone di Puglia; 25: Accadia; 26: Sant’Agata di Puglia; 27: Candela; 28: Anzano di Puglia; 29: Rocchetta Sant’Antonio).

At the same time, population ageing goes on: people over 75 grew (from 7092 to 8089 units, up from 9.6% to 14.4% of total resident population), in less populated towns, mainly upland, they account for more than one-fifth of the population (Celenza Valfortore: 28.2%; Volturino: 27.2%; Volturara Appula: 23.8%; Motta Montecorvino: 23.6%; Panni: 21.6%; Celle di San Vito: 21.3%).

The demographic decline exacerbates the chronic lack of essential services (school, health, and public services) and, above all, the difficulty experienced in protecting a wide range of environmental and cultural heritage [29,30] and to promote their enjoyment by tourists. The *Piano Paesaggistico Territoriale Regionale della Puglia* (Regional Territorial Landscape Plan for Apulia) [31] among the its main issues highlights the soil and subsoil disruption (natural phenomenon exacerbated by demographic depletion, poor maintenance, and unsustainable forms of agricultural transformation for production purposes of extensive slope areas), the loss of biodiversity and of important crop varieties, the abandonment of rural buildings, the quick disqualification of the historic centres involved in few, limited recovery actions and, paradoxically, the increase of urbanised areas, even due to senseless accommodation initiatives funded by Law No. 64/1986 [32]. The document also states that “only in a few towns (...) a policy for the protection of local production identities, effective policies to foster tourism and private initiative in quality restaurants allowed the recovery of ancient vines and support farming and cheese-making” [31] (p. 17).

The LEADER Plus 2014–2020 planning document of the local action group (LAG) Meridaunia (the Monti Dauni development agency that, since 1998, has been promoting interventions and project actions of the Local Development Plan in the area) [29], points out that, despite the sub-region being granted several EU, national, and regional funds, there is a long way to go to achieve an integrated system of tourist enjoyment: indeed, during prior consultation, the LAG noticed a deep dissatisfaction among visitors, “obliged to deal with a multitude of entities (many accommodation facilities, several *pro loco* for guided tours, etc.)” as well as the weakness of hospitality services (with the only exception being restaurants) since “at present there aren’t any major consortia or associations nor any natural inclination towards bundling/cooperation was found, both horizontally (among players of the same sector) and vertically (among players of different sectors); on the contrary, an inclination towards individualism/chauvinism was detected, the first one among players, the latter among municipalities” [29] (pp. 18–19).

The above considerations confirm the need to replace individual public/private players receiving funds with a whole *community*, as the main player of self-governance, able to “re-read the territory” to “return to the mountain”, to propose (to itself and outsiders) the narration of a new “cornerstone” to build “an alternative geography to the extremely fast, crowded and noisy metropolitan spaces” [33] (p. 18), not a “stone rejected”, a fragile, marginal, inland, peripheral place. A closed *community* in regulatory terms but functionally open to the opportunities offered by “networking”, that develop in Italy thanks to the activity of several local collective entities which, in aggregate form and from below, offer a unitary image of villages through the Internet, as “Borghi Autentici d’Italia” (BAI) [34] and “Borghi più belli d’Italia” [35]. Such forms of association tend to promote “virtual” agglomeration economies, able to overcome the critical minimum threshold (in terms of capital, human resources, infrastructure, tourist demand) that in each single village may constitute an obstacle to shared and successful projects of sustainable development getting off the ground.

By Decision No. 870 of April 2015 [36], the Regional Council of Apulia identified the Monti Dauni as the first pilot area of the SNAI, comprising the above-mentioned 29 municipalities and the municipality of Lucera (32,506 inhabitants), a thriving agricultural center of the Tavoliere di Puglia, already connected to the Sub-Apennine through projects for the economic, territorial, and rural development (Pianificazione strategica di Area Vasta, Leader, PIT Puglia n. 10), welfare, and health, which takes part to the definition of this new area strategy as indirect beneficiary of the initiatives. As stated in the Regional Decision No. 951/2018, after long negotiations among all the players involved, “to implement the

Strategy all the available financing sources have been integrated: the funds of the Stability Law for ordinary policies on essential services, equal to EUR 3,750,000, the 2014–2020 ERDF/ESF ROP resources (EUR 40,000,000), as set forth in the operational programme approved by the European Commission in August 2015. Further, Apulian regional authorities, in their 2014–2020 Rural Development Plan and in the ROP, rely on the community lead local development (CLLD) to reinforce the SNAI through dedicated resources. Thanks to this opportunity, the Conference of Mayors of the Monti Dauni Inner Area, decided to include the interventions and the SNAI additional resources of the PSR PUGLIA 2014–2020 (EUR 17,000,000) and those coming from the 2014–2020 ERDF/ESF ROP (EUR 3,000,000) in the Monti Dauni Local Action Plan (LAP), prepared by the LAG Meridaunia for initiatives in line with the Strategy. Therefore, the Inner Area Strategy can rely on a total allocation of EUR 63,750,000” [37]. In particular, about EUR 8 million are allocated to initiatives aimed at the promotion and enjoyment of the cultural heritage. Such resources, in our opinion, could contribute to support and spread some municipal good practices already present in the sub-region, also developed thanks to the above-mentioned spontaneous associative forms [34,35], that we will discuss in the following paragraphs.

The study we propose about the ongoing experiences within the territories of Monti Dauni is not functional to the evolutionary analysis of territorial performances, perhaps through the use of quali-quantitative indicators. We rather believe it is more interesting to follow a narrative approach focusing on the fluidity of ongoing processes as the result of the interaction among participating bodies [38]. These are at the same time intrinsically oriented and influenced by the material context at individual level and able to re-direct and re-define it through specific relational configurations. Such configurations appear specifically located within a space which is at the same time differential and differentiating [38,39].

Pragmatically, SNAI identified and delimited its target areas according to precise criteria of proximity, as well as geomorphological, cultural, and historic–institutional homogeneity. Furthermore, the Monti Dauni area is the result of such a kind of regionalization. In other terms, the area of Monti Dauni is clearly differentiated from its surrounding. Nevertheless, the area is far from being uniform: the functional geography of the Monti Dauni as an inner area overlaps with the micro-geographies of the situated practices. These are spatial-relational assets which are often the result of processes which have settled down over time; specifically, they are univocally locatable, they cross the objectives of the SNAI and contribute to their implementation, determining their success, but they are pre-existing and, unlike them, not always and not necessarily measurable. Since these arrangements are not uniform, it follows that the micro-geographies of the situated practices give a differentiated space, on which the very implementation of the SNAI objectives depends, and therefore it is not necessarily uniform.

It is on the investigation of situated practices, of hidden practices, of minor actors, which this work focuses on a better understanding of the here and now, rather than on the performative evaluation of the territories, which risks activating homologating competitive attitudes that are not sustainable in endemically fragile territories.

#### 4. Experiential Tourism as a Form of Resilience

In recent years, tourism underwent a deep change, evolving and transforming itself alongside the multiplication of the reasons leading a tourist to prefer a given destination: actually, where traditionally the attractiveness of a destination depended mainly on the beauty of its landscape, monuments, or architecture. In the contemporary scene the needs underlying tourist’s choices are increasingly diverse and difficult to figure out. This is the reason why the new strategies of the tourist market do not focus on the sale of “places to visit” any longer, but on “destinations to be experienced” [40], able to offer new opportunities for reflection and unusual emotions to all those tourists who wish to keep an increasingly watchful eye to the territorial identity, connecting with its population, and getting emotionally involved in order to become an integral part of a community instead of

being a mere observer. A growing interest in “back regions” [41,42], that is, “those spaces of rootedness where the dwelling of residents is believed (or imagined) as still possessing a character of genuineness” [43] (p. 513), is perceived in such “experiential” [44,45] visitors, as well as in tourist operators, in clear contrast with the increasing commodisation of the “front regions”. Such genuineness is mainly provided through social relations arising among tourists and the local community [46,47]. This leads to a deep change in the whole tourist system, not only on the demand side, but on the supply side as well, at the centre of which the local communities place themselves, allowing the territory to be known, experienced and appreciated in all its aspects, transforming visitors in temporary citizens who wish to discover realities often remaining outside of the main traditional tourist routes.

The key role of the local community is based on the strategic project “Comunità Ospitali” (CO), promoted in 2012 by Borghi Autentici d’Italia (BAI)—an association of 250 small towns that since 2007 have been making local communities the focus and key element for the relaunch of the unique features of each place [34,48]—with the implementation of the Rete Nazionale Comunità Ospitali co-funded by the MiBACT (Ministry for Cultural Heritage and Activities and for Tourism). The villages participating in the project are not simple traditional tourist destination, but represent “inclusive”, “interpersonal destinations” designed to offer tourists not only a product, but a real travel experience towards genuineness, fostering opportunities for new businesses and a path towards economic and social growth which becomes sustainable thanks to the integration, interaction, and coordination capacity of all the elements and the players, the private as well the public ones.

An interesting example of aggregation aimed at promoting a wide cooperation among municipalities in the same area is the “Sistema delle Comunità Ospitali dei Monti Dauni” that, unlike most of the COs, made of single municipalities or a limited number of neighbouring local entities, involves all the 30 municipalities of the pilot area (see § 3). The purpose of the system, set up on 2 March 2017 and composed of seven COs, is to create an integrated system for the enhancement of local cultural, religious, landscape, food, and wine excellences, by making the Subappennino Dauno a competitive area on the national and international market [49].

The COs are aware that the creation of a strong synergy among the territory players (accommodation facilities and restaurants, craft and agri-food businesses, associations, *pro loco*, and tourist guides) as well as the networking of all the local resources (cultural, environmental, food and wine heritage, events, stories, legends, tales, and anecdotes) are essential in order to offer a real tourist experience to empirical visitors. The municipalities participating in the project try to promote hospitality through different instruments: the *Casa dell’Ospite* (House of Guests), to concentrate organizational functions and carry out common activities (exhibits, tasting sessions, events, etc.); the RRD, *Rete Ricettiva Diffusa* (widespread hospitality network) aiming at the recovery and enhancement of the (public or private) abandoned or underused architectural heritage in order to create a widespread system of accommodating units in the historic centre; the *Cartellone Unico* (single programme) of events, designed to guarantee the resource optimization; the crucial professional and relational role of the tutor, who welcomes and assists guests not as a simple tourist guide, but as an advisor, an accompanying friend, and a guardian of stories and tales known only to the village inhabitants, making the holiday a memorable experience, a travel in the spirit of the village and of its inhabitants; the *Botteghe dei Sapori Autentici* (stores of authentic flavours), shops for the enhancement of the food and wine heritage.

The types of holiday that certainly involve a particularly marked experiential dimension include the gourmet holiday which, over time, became a useful means to know a territory culture “thanks to its ability to convey those values so sought-after by contemporary tourists, that is genuineness, sustainability, experience, respect for heritage and local identity” [50] (p. 7). Food and wine are a strength to exploit, especially in those territories that, though having a strong cooking and winemaking tradition, are located in marginal areas which, nevertheless, through the enhancement of typical products are able to become unique and one-of-a-kind territories, creating a concrete opportunity for

local development [49]. The awareness that food is now an integral part of Italian cultural heritage as well as of the worldwide image of the Bel Paese, lead the MiBACT and the MiPAAF (Ministry for Agricultural, Food and Forest Policies) to designate 2018 as the “L’Anno del cibo italiano” (year of the Italian food), a decision that, in turn, induced BAI to create the patchwork of projects “Comunità del cibo buono e autentico” (communities of good and genuine food), aimed at promoting a form of experiential tourism linked to food and wine traditions, especially for what concerns the genuineness and simplicity of local typical products considered as a set of values, a background, an important heritage, a legacy with ancient roots [51]. The project, launched on 23 March 2018 at BAI National Meeting in Sestri Levante, closed on 30 September 2018 on the occasion of the third BAI National Day on the theme of “Food and wine: a community pride”. Forty-seven villages decided to participate to the closing event, by organizing their own programme on different activity lines proposed by the Association and creating a rich and extremely varied event calendar with 15 different types of local initiatives. The 16 Apulian municipalities that actively participated to the event also included one of the villages of the Monti Dauni: Castelluccio Valmaggiore.

#### 4.1. Castelluccio Valmaggiore and the Project “Comunità del Cibo Buono e Autentico”

Castelluccio Valmaggiore, a municipality of the “Sistema delle Comunità Ospitali dei Monti Dauni” and belonging to the “Monte Cornacchia” C—to which the municipalities of Alberona, Biccari, Celle San Vito, Faeto, and Roseto Valfortore also belong—owes the name of “Castelluccio” to the little castle built around 1300 that housed the Governor of the Feud while “Valmaggiore” refers to its geographical position dominating the whole Celone valley. The municipality, located at an altitude of 630 m a.s.l., extends on an area of 26.66 square km, has 1253 inhabitants, with a density of 47 inhabitants/square km.

Participating to the final day of the event “Comunità del cibo buono e autentico”, the municipality showed the great importance it attaches to the enhancement not only of the tangible heritage (environmental and cultural resources), but of intangible legacy as well, by organizing several historical and anthropological events (folk dances and songs, ancient street games, and historical parades), a necessary contribution for spreading the culture and knowledge of the territorial traditions seen as an essential instrument to develop the tourist image and economy [52]. Further, it organized food markets and stands and proposed tasting of typical products and dishes (cereals, vegetables, grapes, olives, *orecchiette* and *fusilli*, *cacio*, *caciocavallo* and *cacioricotta*, *sfogliata* with onions, and *pettole*) to promote the territorial discovery through the excellent and typical products that make it unique. Through the initiatives put in place by the municipal administration in cooperation with the inhabitants, the associations and the local producers, visitors were able to live and share the past and present spirit of the place, becoming familiar with the territory. At their arrival, after purchasing the daily voucher (EUR 12) to get their breakfast and lunch, tourists were welcomed in Piazzetta Piscero by the “street band” and by some young women in folk costumes who, while dancing and singing, offered them the “farmer’s breakfast” made of fried bread with sugar or wine, cooked at the time, thus allowing a direct contact with cooking traditions through the five senses. The “temporary citizens” could revive some important moments of the ancient community life, such as the grape crushing by feet or the clothes washing in the public washhouse called “il Piscero” where, according to the tradition, by drinking water the “stranger” becomes *castellucese*. Then, it began the village guided visit with the Mayor and BAI tutor of Castelluccio, Maria Manuela Circelli. It included a visit to the traditional mill, still operating, a symbol of the relations among food, territory, and cultural identity; a view of the landscape from the *belvedere* Figure 2; and a visit of the museum, opened on 3 August 2018 and focus on the “Sistema museale della Valle del Celone”, as well as the Main Church and the Byzantine tower, the oldest evidence of Castelluccio Valmaggiore. After participating in a hand-made pasta workshop and listening to a poetry reading in the local dialect, the lunch began. It took place in the centre of the village, in front of the Main Church Figure 3 and it was

a significant moment of conviviality, a time for socializing and sharing among residents and travellers, a re-enactment of ancient meals in friendship and happiness, an example of authentic relationships and genuine dishes (sausages, bean soup, "Spezzatielle", that is local lamb with chicory, eggs and *pecorino* cheese, and local wine).



**Figure 2.** Castelluccio Valmaggiore: view from the *belvedere* (ph. F. Rinella, 30 September 2018).

The data provided by the municipal administration show that about 300 daily vouchers were sold; 80% of the event participants came from the Province of Foggia, while 20% from the provinces of Bari and BAT.

Overall, the village of Castelluccio Valmaggiore, by actively participating in the final event of the project "Comunità del cibo buono e autentico", proved its ability to fully capture the opportunity offered by BAI, especially valuable for the inland municipalities that, due to their small size or organizational weakness, cannot aspire to become the destination of significant tourist flows, but made a strength of their "being small" (not surprisingly, Castelluccio's motto is "Parva sed apta mihi"—that is "small but suitable to me"). Unfortunately, after that event, as confirmed by the BAI tutor in a telephone interview carried out in November 2020, no new initiatives were organized, probably due to the unavailability of resources to allocate to such forms of promotion. We hope that SNAI Area Strategy could again engage the local community in a process which E. Cohen

and S. A. Cohen define as “hot authentication” [53] (p. 1303) deeply rooted in the “daily life flow” (ibidem, p. 1300) and, therefore, focused on “flavours” and “smells”, territorial basis of the identity of a “small” community, but suitable to the need and wishes of many “temporary citizens” in search of new “destinations to experience” [40].



**Figure 3.** Castelluccio Valmaggiore: the lunch set in front of the Main Church (ph. F. Rinella, 30 September 2018).

#### 4.2. “Alberone pare Na Zita Bianca-Vestite...” (“Alberona Looks Like a Bride all Dressed in White”)

Some years ago, the ancient medieval village of Alberona, located at 732 m a.s.l. on the slopes of Monte Stillo, framed by a changing wood landscape, with its small community of 902 inhabitants started a series of initiatives aiming to counteract the demographic decline, thus showing a remarkable capacity of interaction with the supra-local level. In 2002, it was the first Apulian municipality to be awarded the Orange Flag by the Touring Club Italiano (TCI) [54]; further, for several years it was part of the association Borghi Autentici d’Italia (BAI) [34] and belongs now to the network I Borghi più belli d’Italia [35]. Alberona, where one of the national Unesco Club is located [55], is the main location of the *Festival della Dieta Mediterranea*, whose first edition dates back to 2013, and through which it has been possible to increase every year the presence of visitors, who, during three days, have the opportunity not only to participate in the wide scientific programme involving experts and scholars of great renown, but to get inside the life of the village, becoming integral part of an event *for* and *with* the community.

The latest editions were sponsored by other neighboring municipalities (who in some cases also participated), thus further consolidating the alliance and the network created among and around those small villages. In particular, the last edition, held on 27, 28 and 29 September 2019, also actively involved the municipalities of Troia and Lucera, that had the opportunity to host, each of them for one of the three days, the festival within their territories. The primary concern of the seventh edition was the agri-food identity of the territory, combining innovation and sustainability. These topics were addressed not only through meetings and debates, but also by guided tours, workshops and visits. The event was organized by four Unesco Clubs (Alberona and Lucera, in cooperation with

Cassano delle Murge and the Vulture Unesco Club), the Rotary Club and the Lions Club of Lucera, the Inner Wheel of Cava de' Tirreni, the Federazione dei Club e dei Centri per l'Unesco Italiani (FICLU) and the partnership of the LAG Meridaunia; "the protection and promotion of the values of Mediterranean diet" explains Orfina Scrocco, President of the Alberona Unesco Club, "go through the enhancement of agri-food identities, knowledge and traditions of our territory, which, combined with technological innovation, represent a wealth to make known and to share in order to create an intercultural dialogue" [56].

The enhancement of the agri-food identity and in particular of the local food and wine culture, also include a number of events held in the months of July and August, during which several tourist facilities of the village take turns in promoting the typical dishes of the Alberona cooking (a different dish for each structure).

Further, Alberona is the location of the International Poetry Award "Borgo d'Alberona", organized since 2006 to pay a tribute and to promote the ancient poetic and literary vocation of the village, historically represented by poets as Giacomo Strizzi (1888–1961), Vincenzo D'Alterio (1940–2000), Camillo Civetta (1870–1960), and Michele Caruso (1892–1967) as well as by the "Gazzetta letteraria alberonese", published since the first decades of 1900 and currently kept in the municipal Antiquarium. Moreover, to the above prominent representatives is dedicated the "Muro della poesia" or "Muraglione dei poeti", a monument unveiled on 22 August 2010, during the awards ceremony of the fifth edition of the poetry contest. It shows the image of the four Alberona's artists, who become ambassadors of the visitors through the dialect verses of their works, engraved on the monument, narrating the home village: "Quante je bbèlle 'stu pajése méje, mbacce a 'na muntagne arrampecate! Se lu guarde da sott'e da luntane, 'na mandre janche d'ajeniddhe pare" (how beautiful is my village perched on a mountain! If you look at it from below and from afar it looks like a flock of white sheep)" [57]; "Pped'a di Montahure, sop'a na ripa vèrde, Alberone pare na zita bianca-vestite" (At the foot of Montahure, on a green slope, Alberona looks like a bride all dressed in white)" [58] (Figure 4). The monument, created on the occasion of the hydrogeological restoration works of the wall below the Town Hall, shows how very practical needs can effectively combine with a highly identitarian urban regeneration, leading to new forms of enhancement and attraction.

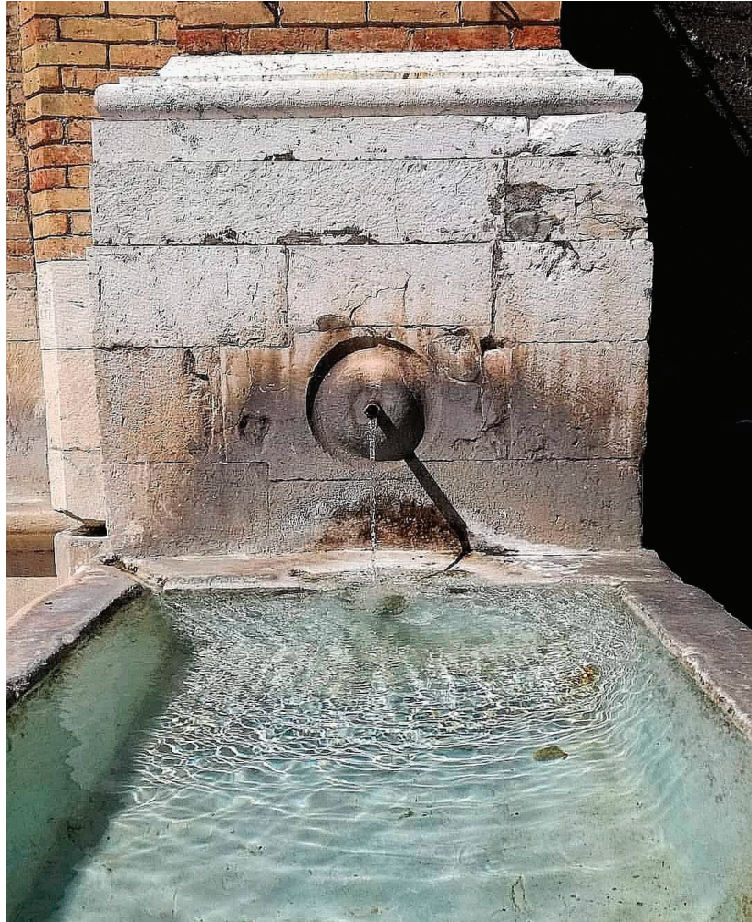
The municipal administration was indeed commendable for their ability to intercept several forms of public financing (Province, Region, EU) to promote the upgrade of the road network, the recovery of the hydrogeological instability, the enhancement and protection of the environmental and anthropic resources. Particularly noteworthy are the works, still in progress, for the upgrade and recovery of the hydrogeological instability in the sports field area, funded by the ERDF/ESF ROP Puglia 2014–2020 (axis V, action 5.1), supplemented by the project for the extension of the existing sport facilities and the creation of a nature trail; the interventions for the restoration and upgrading of seven fountains (Fontana Muta see Figure 5, Fontanella, Pisciarelli, Fontanino di piazza Civetta, Fontana del Pozzo, Fontana di via Belvedere, Fontana del Monumento ai Caduti), that will create a walking path and cycleway within the village, also known as "town of water" or "one hundred fountains village"; lastly, the repair of the pavement of some areas of the historical centre by regional funds. Huge interventions, carried out through different financing, also concerned the road network, thanks to which it was possible to fully recover the external connection roads of the village as well as many of its internal roads, with a positive impact on the accessibility and availability of the places by whoever wishes to live in them or reach them; the works for the improvement of public lightning, thank to which it was possible not only to install LED lamps on the whole municipal territory, but also LED spotlights to enlighten the main public and cultural buildings for the benefit of residents and tourists; the installation of the required signs, previously missing, to reach, from the village, the nature trail "U canale di tegghje" (channel of the baking pans). The name derives from the peculiar shape of the small falls created by water and stones) through which it is possible to reach the wood, the river and the small falls created by water and stones along its stream and that give the name to the place. Among the financing proposals submitted but still pending, the following are



to be mentioned: (1) the project for an underground museum network, to be managed by a community cooperative composed of Alberona young people, for which an allocation of EUR 1,000,000 was applied for to the MiBACT; (2) the project for the construction of a panoramic cableway to connect the village to the top of the Monte Crocione-Pagliarone, for which an allocation of EUR 14 million has been applied for to the central Government, to be complemented by nature trails and rest areas, a bicycle parking station and the recovery of sheep tracks [59,60].



**Figure 4.** Alberona: the “Muro della Poesia” (photo courtesy of the Mayor of Alberona, Leonardo De Matthaeis).



**Figure 5.** Alberona: detail of Fontana Muta. The name of the brick and stone monumental fountain, built in 1824 and located on the public road, comes from its original function of resting and exchange place for horses and couriers. The fountain has five spouts, two troughs, and a washtub (photo courtesy of the Mayor of Alberona, Leonardo De Matthaëis).

One last remark concerns the “virtual” promotion: indeed, even though the information on the village and its initiatives are conveyed in a detailed though fragmentary manner through several digital channels, whether institutional or not, and local on-line newspapers [54–56,59–62], actually they are not easily accessible to those who wish to investigate and explore Alberona’s tangible and intangible heritage before reaching the place, with a negative impact on the potential multiplier effect of the above mentioned events. To give Alberona full *imageability* [63], it is necessary to grant that information high *findability* [44] (p. 55) through an updated website, well indexed by search engines and available in foreign languages, as being invisible on the Internet “in the Google era is like not existing at all” [*ibidem*] (p. 47). This gap could be filled precisely through SNAI targeted actions, in view of a self-enhancement path aimed at the systemic recovery of the Monti Dauni territorial resources and able to attract soft tourism, in search of a genuine experience, experienced according to environmental, cultural, economic, and social sustainability.

#### 4.3. Biccari: When “Being a Community” Creates “Cooperation”

The beneficial effects of a mixed top-down/bottom-up transcalar approach as the one proposed by SNAI are detected in a more immediate, evident, and effective way in the local systems used to collaborate within voluntary, supra-local networks whose objectives appear fully in line with those set out by the Area Strategy of the Monti Dauni.

This is the case of Biccari, a town with 2696 inhabitants located in the Monti Dauni Sub-Region (Table 1, Figure 1), whose Mayor, Gianfilippo Mignogna, in office since 2009 and reconfirmed in 2019 at the head of the Biccari community for the third mandate, is also Deputy Vice President of BAI, the association promoting, together with Legacoop, a national initiative aimed at experimenting the model of the “community cooperatives”, one of the possible forms of civil economy enterprise based on the principle of social and environmental sustainability [64]. By stimulating the autonomy, the citizens’ organizational capacity and the sense of belonging [65], the initiative, launched in the wake of similar experiences in France, United Kingdom, Germany, and Greece, strategically aims at producing “site-specific” advantages, by strengthening the territorial fabric and its capacity to influence the welfare level of the local community. Such institution, that becomes an entrepreneur to meet collective interests [66], may thus play a key role in promoting those paths defined by Magnaghi as “bottom-up globalization” [67] (p. 309), aimed at actively engaging local community members, setting the direction of shared territorial actions.

Apulia was the first Italian Region to regulate the institution of the community cooperative (Regional Law No. 23 of 20 May 2014), considering it as a preferential entity to implement active labour policies aimed at creating new jobs starting from the enhancement of the territorial tangible and intangible assets, in order to meet the requirements of the local communities and, more in general, to create social capital [68] (p. 17.870).

In November 2018, Apulia regional authorities funded the first three Apulian instances of community cooperative. Among them, the Cooperativa di Comunità di Biccari (CCB), being specifically production-oriented, qualifies as a social initiative aimed at reducing the weakness of the local system of tourist offer and to focus it on experiential tourism, based on the increasingly common desire “to see life as it is really lived even to get in with the natives” [41] (p. 592).

The CCB, set up on 7 June 2017, was designed by the Organising Committee as a real intra-generational agreement *for* and *with* Biccari young people: this is why 6 out of 7 members of the Board of Directors are citizens under 35. By entrusting the CCB free of charge a hardly or not at all used public heritage (the forestry nursery “Orto di Zolfo”, mountain areas, former school building, gymnasium, etc.), into which start and manage insider and outsider services, the Municipal Administration intends to transform the “territory-heritage” in “territory-project” [69], by consolidating the capital and emotional investment of the local community in collective heritage and its appreciation. Such main mission could be complemented by the provision of social services (e.g., elderly care, leisure activities for children, etc.), as well as the management of uncultivated land and, above all, vacant/abandoned houses in the historical centre, for example by creating a community hotel [70].

The first step of the CCB was the upgrading the works of the kiosk near the lake Pescara, currently used for as tour booking and a refreshment point for tourists. Part of the Monastery of the Frati Minori di Puglia, located at 1 km from the town, was turned into a hostel and entrusted to the management of the CCB, within the AIG (Associazione Italiana Alberghi per la Gioventù) network; during summer 2017 when the facility hosted 200 guests. During the BAI National Festival held in Biccari on 15–17 June of the same year, about 10,000 visitors were estimated, with 70 overnight stays in the municipal territory, as well as the engagement of 20 resident members in the activities related to the event organization. Furthermore, thanks to a municipal finance facility of EUR 13,000, the InfoPoint of Piazza Municipio was opened, where five resident members work.

An aspect particularly significant in geographical terms is the increase of the rate of proactivity of local players, to which the enhancement of the links of cooperation surely

contributes. This is firstly evidenced by the remarkable planning: during 2017 the CCB was awarded financing facilities relating to three regional calls for the organization of attraction events, such as cycling tours, trekking, activities, and visits concerning local products, with significant positive effects on economy and employment also for the neighbouring towns. Added to this is the strong inclination to widen the collaborative networks: we refer to the mapping of uncultivated land, carried out with ARIF (Agenzia Regionale attività Irrigue e Forestali) and which lead to a memorandum of understanding between the ARIF and the Municipality of Biccari concerning the return to the latter of about 2 ha of the forestry nursery entrusted to the CCB and now dedicated to the production of wild berries, or the participation of Biccari in the IT.A.Cà national network, by hosting the first edition of the Festival del turismo responsabile dei Monti Dauni.

The pilot activities, experimented through the funded projects, featuring a “virtual” image since inception thanks to the official website [71] and to the app “WhatsCoop”, which allows to receive free updates on initiatives, events and meetings, have now transformed into a permanent offer of comprehensive and diversified packages. The proposals include trekking and cycling tours, weekends, truffle hunting, archery, triathlon, laser tag, and paintball. Further, picnic baskets containing certified local products, such as truffle cream and the “pizza a forno aperto”; or the “Bubble Room”, a mini pop-up house with clear walls and ceiling to sleep under the stars, fully immersed in the wood magic near the lake Pescara. Presently, the offer is focused on food and wine and the nature attractions of the area of the Monte Cornacchia and the lake Pescara, but the activities also concern the historic centre. From September 2019 a tourist portal is on-line [72], whose contents are now also available in English. For its implementation all the stakeholder (shops, B&B, restaurants, associations, etc.) were invited to send photos, videos, texts, and useful information on their business that were published for free.

However, the role played by the CCB in strengthening the autopoietic characteristics of the Biccari territorial system does not appear only in its contribution to the metabolizing processes of positive incentives (in the specific case, the capacity to find financing facilities through the enhancement of a shared planning): indeed, after the Covid-19 onset, it strongly aroused the pivotal function of the CCB in orienting “resistant” actions, with incremental effects on overall resilience levels of the system. In particular, “Artisti Riuniti” was the first initiative of the CCB, held on-line right during the Italian lockdown (9 March–18 May 2020): it was a real charity auction to support the Policlinico Ospedale Riuniti di Foggia, main health facility of the area, severely tested by the health emergency. The initiative was also made possible thanks to some local artists who donated their works to sell. The proceeds were delivered in August 2020 during an exhibition of the auctioned works of art.

The BICs (Buoni Incentivo Comunitario) are discount vouchers issued by the Municipality. Launched in June 2020 and expiring in May 2021, they are applied for by tourists/visitors and used at shops and accommodating facilities participating in the initiative. The businesses cashing the vouchers, in turn, may reuse them at other businesses of the town. There is a dual purpose: from one side, relaunching tourism in a period of deep crisis and, in general, increasing the number of customers of local players; on the other side, also through the BICs reuse, retain in Biccari those financial resources, thus supporting the local economy by preferring internal consumption, thus enhancing the community cohesion.

“PerDopo” is a coupon for a postponed drink or meal, conceived on the basis of similar experiences at the national level and replicated by the Biccari community. Through the on-line payment it was possible, during the lock-down as well as in the following restriction period starting from November 2020 and still in progress in Italy, to purchase drinks or meals at bars, restaurants, and pizzerias of the town, thus supporting one of the economic sectors more affected by the measures preventing the spread of the Covid-19 contagion.

Finally, the traditional Christmas market that in previous years, during the November and December weekends, attracted a large number of visitors in the small Daunian town, in 2020 a new system has been proposed. In order to support craftsmen and small local

producers, to whom the market was an important opportunity for visibility and profit, the official website of the cooperative [72] provides a real on-line showcase, allowing producers to offer their products and making them available for on-line purchase. Apart from the specific needs related to the Covid-19 emergency, which lead to adopting this new business channel, the above experience may of course represent a test for small producers and local craftsmen who are interested in making their products known to a wider public; in this case, it is particularly clear the driver role played by the CCB that, besides making concretely possible an experience otherwise unsustainable by single producers, proposing itself as “territorial aggregator” enhances the *placeness* of the products offered, which therefore acquire an added value clearly perceived by potential purchaser.

Thus, the initiatives launched to tackle the health emergency also highlight the CCB attitude to act according to a “variable range” mode. All the initiatives are first of all conceived to meet the requirements of diversified targets: the community in the first place (the hospital, as an essential reference service; local businesses and producers, as active and central members of the system), but the experiential tourist as well, through the invitation to support the territory, widening its status of temporary citizen beyond the contingent experience and increasing the engagement level. The initiatives also achieve different goals, ranging from the economic support to the launch of active citizenship practices; likewise, the effects range from short- to long-term. This shows, on one side, the complex analysis of effects and players and, on the other side, an approach to an emergency whereby actions are designed to tackle effectively both the extraordinary conditions and the structural effects; the latter aspect provides a planning action to prevent the spreading of the social and economic effects of the pandemic on a clearly programming and not only contingent level.

## 5. Conclusions

An economy depending on an unprofitable or declining agriculture, trade and services contraction, sharp depopulation and population ageing, poor enhancement of existing resources and/or potentials, social and economic stasis, and conservative and traditional forms of territorial organization and ways of life: these are the features common to most of the settlement network of Italian inner areas, rich in small towns, the so-called “borghi”, away from tourist circuits featuring “imageability” [63]. Despite such marginal conditions, in recent years some of them showed the intentions to become sustainable and responsible communities, able to open themselves, to include and to look with hope beyond the decline, changing their route, instead of closing in on themselves. They are local systems with the precise goal to create new development prospects based on the enhancement of their own “raw materials”, represented not only by environmental and cultural heritage, but by a set of intangible assets (quality of life, social cohesion, human capital, and flavors and knowledge of the territory) considered as concrete opportunities of rebirth. Thus, the communities can become key players of a real “hot authentication” path according to the definition given by E. Cohen and S. A. Cohen [53] of their *milieu*, initiating a “recreational re-ruralisation” [73] (p. 206) that catches the interest of travellers in search “a break to replenish energies and regenerate” [33] (p. 20), creating “unprecedented forms of economy and socialization and building new-ancient meeting places” (*Ibidem*).

If today, in the settlement network of Italian inner small towns, not lacking in discontinuities and patches, a resistant “common thread” is noticeable, which allows to overcome optimistically several weaknesses, this is due not only to the firm “restance” [74,75] of the many individual or collective “custodian of the territory” present, but also to the new way of thinking and implementing the social and spatial justice [76] initiated by the SNAI, with a mixed top-down/bottom-up approach, who acts as an institutional framework for the placed-based processes of local development. Likewise at a national level, voluntary networks as “Borghi Autentici d’Italia” [34,48] and “Borghi più belli d’Italia” [35] represented, and still do, an empowering environment for small-sized local systems with poor planning capacities, due to a marked political and institutional, as well as geographical, peripheral condition. Among the administrative regions, the far-sightedness of Apulia in putting in

place a regulatory instrument as the Regional Law No. 23 of 20 May 2014 (see § 4.3) not only represents a general sensitivity of institutions, but also a strong intervention capacity, due to a deep knowledge of territorial weaknesses and potentials.

In December 2020, the SNAI testing phase will end, with the obligation of terminating all the Framework Programme Agreements (FPA) stipulated by the 72 “project areas” in order to proceed to the next structural phase of full implementation of the planned interventions. Notwithstanding the bureaucratic issues due to the difficulty of quickly coordinate a large number of entities—central ministry administrations, Regions and Municipalities [77]—multiple positive and innovative elements of this testing lead the European Parliament, in April 2019, to include the “SNAI model” positive features in the ERDF 2021–2027 planning [78] (p. 9).

The Monti Dauni pilot area does not lack in tourist enhancement initiatives to target. Sometimes they are incidental, as in the case of Castelluccio Valmaggiore (§ 4.1), sometimes they are systemic but still lacking “imageability” [63], as in the Alberona community (§ 4.2), up to mature capitalization forms as in the case of Biccari (§ 4.3): in particular, this latter local system seems able of metabolizing all the external incentives, both positive (regional, national, and EU financing facilities) and negatives (Covid-19 pandemic), operationally conveying them into what Raffestin [79] calls the “actor’s programme”, that is a real territorial project which appears to be endogenous and self-centred, constantly self-perpetuating. The main development driver of the network appears to be the “innovating” administrator (with similar characteristics to the entrepreneur described by Schumpeter) [80], in the person of the Mayor Gianfilippo Mignogna, also Vice President of BAI, able to continuously promote the interaction between Biccari’s small community and the supra-local contexts.

In the light of the above, it seems clear that the present and future task of inner areas governance in Italy shall be the strengthening of two key skills: “creating the local society” [58] (p. 80) and “nurturing the *amor loci*” [81], essential elements to promote a “bottom-up globalization” to which every local player has to participate “to make a *direct* contribution to the production, care and reproduction of its own life and relationship environment, creating new interconnections among individual activities and social purposes of production and consumption, widening the values of use, the non-negotiable shared assets, the off-the-market activities able to initiate multiple forms of mutually supportive exchange” [67] (p. 309). At the same time, the qualities seen by Caravaggi and Imbroglini [82] as peculiar to “resilient” local systems shall be strengthened: flexibility, inclusiveness, integration and, above all, resourcefulness, which is “the ability to achieve economic viability goals and development prospects through new creative and innovative avenues” [*Ibidem*] (p. 148).

**Author Contributions:** For research articles with several authors, a short paragraph specifying their individual contributions must be provided. The following statements should be used “Conceptualization, A.I., A.R.; methodology, A.I., A.R., F.R., F.E., S.N.; investigation, A.I., A.R., F.R., F.E., S.N.; writing—original draft preparation, A.I., A.R., F.R., F.E., S.N.; writing—review and editing, A.I., A.R., F.E.; visualization, S.N.; supervision, A.I., A.R.” Please turn to the CRediT taxonomy for the term explanation. Authorship must be limited to those who have contributed substantially to the work reported. Although both theoretical framework and Conclusions are shared by the Authors, Sections 1 and 2 are to be attributed to A.I., Section 3 to A.R., Sections 4 and 4.1 to F.R., Section 4.2 to S.N., Section 4.3 to F.E. All authors have read and agreed to the published version of the manuscript.

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## Article

# Permaculture and Downshifting-Sources of Sustainable Tourism Development in Rural Areas

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**Abstract:** The purpose of this research is to find if the stakeholders involved in rural tourism (primary producers of ecological goods, tourism service providers, and tourists, as carriers of demand for tangible products and ecological services) are concerned with integrating principles and values of sustainable tourism through permaculture and downshifting, and how these two phenomena might become sources for sustainable development in rural areas. To achieve this purpose, qualitative research was conducted among tourism producers, intermediaries, and tourists from the Brașov region—one of the most important touristic areas of Romania and, also, an important region with rural tourism destinations. The results revealed that there is a particular preoccupation regarding permaculture and downshifting, and they might contribute to the local development of rural tourism areas. The novelty elements brought by this research are synthesized in a matrix where permaculture and downshifting were presented as important sources for the sustainable development of tourism in rural areas.

**Keywords:** rural tourism; permaculture; downshifting; development; sustainability; local resources



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## 1. Introduction

Tourism has many positive effects and influences directly and indirectly to the economic development of the areas that have tourism sights. Tourism may, also, contribute to the development of areas that are not rich in economic resources, but with natural and anthropoid resources [1]. According to OECD (The Organisation for Economic Co-operation and Development), tourism will follow four major development trends by 2040: (1) evolving visitor demand, (2) sustainable tourism growth, (3) enabling technologies, and (4) travel mobility [2]. In terms of changes in the profile of tourists, there are also drastic changes that will affect the evolution of this field in the medium and long term. On the one hand, it is about demographic change, which, especially in European countries, is becoming apparent. Their impact on the economy can bring about significant changes in business models. On the other hand, it is even about changing tourists in terms of how they choose to spend their lives and how they want to get old. Today's tourists are increasingly concerned about their health, the place they choose to spend their holidays, the shift from mass tourism to the niche [3]. Some of the most popular tourist locations in Europe are the big cities. It can be appreciated that these are compulsory destinations for tourists, and they can be considered advertisements for a country. Cities and metropolitan areas are important for tourism because they represent residences of national or regional governments, they possess monuments and important buildings; they are places that host important events and various ceremonies; they are businesses and commercial centers, they host nightlife and provide multiple possibilities for fun. They are preferred because they provide a large variety of entertainments and full services in a relatively small area.

During the last decade, the tourism industry has undergone important transformation stages, because of a complex of economic, social, and cultural factors. Lately, the attractive-

ness of rural tourism has increased. All of these have led to the separation of an important part of the tourist activities from the area of standardization of products, services, behaviors, and assumptions considered typical for tourism and the orientation towards the horizons of return to nature, with everything that involves. It can be assumed that most tourists go to the countryside to take a break from the city bustle, but in the countryside, they require appropriate comfort—not only bathing and flush toilets, but also swimming pools, whirlpools, internet connection, parking spaces, and the like. In this situation, rural municipalities must decide to become ecologically oriented and may benefit from being specific, while others will focus on commercial tourism. Therefore, we consider that downshifting and permaculture may represent opportunities to address these new challenges in rural tourism development.

Considering downshifting to sustainable living, deciding what is a good lifestyle is the first step to finding, planning, and developing the ideal self-sufficient small farm [4]. Permaculture, ancient traditional farming, and nature herself is the base of this kind of farming. The downshifting principles are applied in every aspect of a downshifting follower's life.

Rural tourism begins to be more and more appreciated by tourists from all over the world. Inside this form of tourism, the phenomenon of downshifting [5] can harmonize, defined as a social behavior or trend in which individuals lead a simple life to escape materialism and obsession to reduce the level of stress that can accompany this obsession. Permaculture, ancient traditional farming, and nature herself is the base of this kind of farming. As Holmgren [6] mentions, they tend to choose to retrofit instead of new construction, allowing permaculture downshifters to focus on food production, water systems, home-based livelihoods, and community resilience rather than sinking all their efforts into state-of-the-art eco-housing. The downshifting movement is marked, painstakingly around the notions of “penury” of time and loss of connection with the world and with yourself. In rural areas, tourists are invited to alternate uneasy peasant labor and serene outdoor recreation. This fact allows tourists to appreciate the holiday in a much deeper and sensitive way, giving them the possibility to return to origins which is the basis of downshifting. Rural tourism is a kind of tourism, which presupposes rest in the rural wilderness, far from the city rush and noise, where you can experience a journey imbued characterized by a stay in one place for a long period of time and where you can see things that are close to your soul.

However, the relationship between tourism, permaculture, downshifting, and rural development is complicated. There seems to be no single path and rural communities should choose the direction in which to focus their development regarding the potential of tourism.

Therefore, this research aims to identify to what extent permaculture and downshifting are perceived by local stakeholders as sources of development through rural tourism in Braşov County, Romania. In this sense, the authors have established the problem statement as to what extent involved stakeholders are familiar with/have knowledge of the concepts of permaculture and downshifting and whether they use them in rural tourism activities. Therefore, the researchers conducted qualitative research with the aim of answering the following questions: How are permaculture and downshifting perceived as tools in rural tourism?; In what particular way permaculture and downshifting have an impact on tourism activities in the rural tourism area of Braşov County?; What is the importance of other elements that might influence rural tourism, especially in connection with permaculture and downshifting?; What are the specific elements in organizing the rural tourism networks?

The research brings some elements of novelty, by trying to identify a connection between downshifting and permaculture (both in theory and practice), to what extent they might contribute to rural development and, also, by integrating the elements that define permaculture and downshifting as sources of tourism development in rural areas from Braşov County.

The present paper is structured into five sections. The first section introduces the concept of rural tourism development and the potential influence that permaculture and downshifting might have on it. The second section is dedicated to the literature review, while the third section describes the research context and methodology. The fourth section presents the main findings of the research and the fifth section includes the researchers' own interpretation and integration of the results. Finally, a series of conclusions are highlighted, as well as implications for different categories of stakeholders from rural destinations and the main limitations of the study.

## 2. Literature Review

### 2.1. The Importance of Rural Tourism in the Development of Rural Areas

Conceptual approaches and practice in tourism areas highlight an essential aspect which consists in the existence of a harmonious relationship with the environment that is necessary to create tourism services, including the related tangible elements, with direct effects on maintaining and improving the tourist experience. At present, the well-known expression "a beautiful and friendly destination" is no longer enough, as tourists want more and more to visit places that disconnect them from the usual rhythm of life, to awaken their interest and passion, to captivate them and to entertain them, to offer education and lasting memories—all of them in the context of environmental care and respect for the resident population of the visited area.

Tourism is a driving force in rural development. Rural development can be operationalized at the level of the individual farm household. At this level, rural development emerges as a redefinition of identities, strategies, practices, interrelations, and networks [7]. Moreover, following Heal [8] and Weitzman [9], it is argued here that rural development can be enhanced, by achieving optimal diversity of economic activities in the rural communities. Tourism activities may become an excellent source of economic diversity in rural areas.

Rural tourism is not a new phenomenon in EU countries, such as Romania. It has been practiced for a long time either spontaneously or organized, as a tourism activity in the rural environment. In recent years, rural areas have undergone a significant social and economic change, largely due to the powerful restructuring processes imposed by globalization and, by the financial crisis [10–13] and, also, because of man's actions, especially the over-exploitation of natural resources and unsustainable farming methods [14].

The role of tourism in rural areas is pivotal for the integration and Valorisation of territorial resources and it is strengthened by the capacity to promote local community participation in development processes. Capturing the distinctive feature of rural development, and its appeal in terms of tourism lies in knowing how to rethink drivers of development through specific actions, such as: promoting the coexistence of inclusive processes to regenerate social capital; building and strengthening existing networks between the rural territory and external areas (particularly between rural areas and urban centers); job creation; and, finally, economic growth. In the same way, a balanced model of rural development must also be based on coherence between the rural area's ability to attract external resources and its ability to generate internal opportunities, ensuring that actions for rural development meet the collective needs of the territory [15].

From an economic perspective, rural tourism has been regarded as an effective strategy for sustainable social and economic development [16]. Moreover, through tourism, rural villages have a chance to revitalize their communities by using and commodifying existing local resources [17]. So, tourism development is important for the rural space, both economically and socially. Thus, rural tourism contributes to the economic development of localities by means of the following [18]:

- achieving a tourism development policy on the short term, connected to other sector policies: agriculture, infrastructure, environment protection.
- becoming a support for new businesses and jobs which contributes to a new local and regional development.

- encouraging local traditional activities, especially handicrafts, but also those that can contribute to the development of specific commerce and new jobs.
- increasing income in the case of the inhabitants of rural areas generated using local resources, agricultural ecologic products for tourists' consumption and the existing tourism potential.
- spurring the process of increasing life quality in the rural environment.

## 2.2. *Permaculture and Downshifting, Sustainable Sources of Development in Rural Areas*

In rural areas, there are specific tourism assets that can provide economic and social wealth, local experiences that tourists seek, as well as the spaces suitable for ecological tourism services, which leads to the holistic sustainable development of these areas through community-based tourism initiatives [19–21]. The purpose of these tourism assets is to provide regenerative economic and social wealth, but they also include environmental, ecological benefits. For these reasons, rural communities represent suitable places for permanent agriculture (permaculture) and downshifting,

Permaculture represents a holistic, environmentally friendly approach in designing and developing human settlements, assuming a harmonious and sustainable integration of landscapes and people [22]. The concept was introduced by Bill Mollison and David Holmgren in the 1970 and it refers not only to a simple return to nature but also to a system of sustainable development based on natural principles, a way of using nature to increase the sustainability and quality of life [23]. As people and their livelihoods depend on the environmental health and productivity and their actions play a critical role in maintaining the health and productivity of the ecosystem [24–26], permaculture appears as a planned system that imitates the model and interactions established in nature by integrating sustainable management practices [27].

The ethics and principles of permaculture are transposed in a concise and comprehensive statement [28]. In the absence of a global ethical strategy regarding the environment, permaculture provides a convincing relationship between ethics and environmental wellbeing [29,30] through the three ethical orientations—earth care, human care, and fair action—, by setting some boundaries for consumption and by adapting those orientations to the research context, as follows: clean, ethical, and healthy [31].

The first ethics “earth care” (Clean) relates to all the aspects of permaculture. It focuses on the fact that ecosystems must be maintained based on the idea that human beings cannot develop harmoniously without a healthy Earth. The second ethical guideline “human care” (Ethical) refers to fulfilling the essential and existential requirements of people so that people can live their life at a reasonable quality. The third and the last ethical orientation, “fair action” (Healthy) is a combination of the first two ethical guidelines. According to this orientation, human beings must share all the renewable and non-renewable resources with other living organisms and save resources for future generations [32,33].

The term “downshifting” (known, also, as “off the grid”) emerged based on the refusal of people from Western societies to consider material values, hierarchical position, and money as defining elements of their existence, by preferring the idea of the quality of life, the intelligent way of spending the time, without becoming a slave to labor [34]. Its origin consists in the term of “voluntary simplicity”, a concept of religious origins appeared in the XIX-th century [35].

The first use of the term “downshifting” was attributed to Gerald Celente from the New York Trending Research Institute in 1994, who emphasized it as the most fundamental change in the way of life from the economic crisis [35]. Downshifting means connection—to life, family, food, and place—and, also, balance—in personal, work, family, spiritual, physical, and social life [36]. Until now, studies regarding downshifting are focused only on a small part of the population, so its representativity in the world is not known enough about [37].

Under the influence of this concern of slowdown, “finding an appropriate balance between work and personal life, embracing life with fewer financial resources, and opting for a simpler, greener and happier life” [38], more and more tourists from all around the

world are currently looking for green destinations, supporting local communities, trying to reduce the negative impact on the environment. Once more here, for them, the idea is to enjoy the destination and make the most of it. By making the most of their stay in a destination, it is not said to collect a series of must-see buildings, running from a spot to another. These kinds of tourists' holidays are to chill, relax and enjoy, feel the atmosphere of the destination they visit and immerse themselves completely in the local environment. This active global movement of individuals, groups and networks working to create the world they want, by providing for their needs and organizing their lives in harmony with nature is often linked with permaculture.

Permaculture is also a worldwide network and movement of individuals and groups working in both rich and poor countries on all continents. Largely unsupported by government or business, these people are involved in contributing to a sustainable future by reorganizing their lives and working around permaculture design principles. In this way, they are creating small local changes that act in the wider environment, through organic agriculture, appropriate technology, communities, and other movements for a sustainable world [39]. As tourists, people concerned about permaculture in their journey to downshifting are seeking the same philosophy of living in a sustainable economy. They search for "solution partnerships" instead of wild market competition. They appreciate models from nature, show and apply them into economics to create sustainable business models [40].

Permaculture challenges people to take responsibility for themselves and the economy that sustains them by designing and practicing permanent, sustainable cultural and agricultural systems created in accordance with environmental knowledge [41]. In some cases, this responsibility means taking into consideration the permaculture's opportunities and providing a more holistic framework for moving organic agriculture certification forward, to stay ahead of the marketers and regulators driving a pack of more conventional food and forest product certification schemes [42].

Permaculture and downshifting are in interaction, and this aspect has been highlighted in the literature by the concept of permaculture downshifters [28]. A sustainable lifestyle, everyday life but also holidays, based on these two concepts, is a realistic, attractive, and powerful alternative to dependent consumerism.

### 3. Materials and Methods

#### 3.1. Research Context-Braşov County, a Destination with Rural Tourism Potential

Romania is one of the countries with a remarkable rural potential, so rural tourism could become a country brand. The natural landscapes, the fresh air, the folk architecture, along with centuries-old customs and the gastronomy are just a few of the elements that make up the Romanian village [3].

Romania has an impressive rural heritage that could be successfully included in an attractive tourism product at the international level [43]. Romanian villages have always been an attraction for tourists and, for that reason, some attempts to organize tourism activity started in the 1960s. Romania represented a good example which showcases that a close relationship between agriculture, food and tourism might become the key to long-term development, profitable both for the involved stakeholders and for the local community. However, the lack of legislation and the low interest from the authorities have delayed the development of a specific infrastructure to support this niche. Thus, there were no coherent tourism products in rural areas until 1990 [44].

The Romanian rural household is the socio-economic unit for which the farming activity continues to be the main source of income or at least of supplementing incomes in the form of self-consumption; thus, most rural households overlap the agricultural household farms/peasant farms/small-sized farms [45]. In Romania, agriculture employs most rural inhabitants, and most farms are under 5 hectares. There are 3.9 million farm holdings in Romania, the majority of which are family farms of extensive semi-natural grassland pastoral systems and mixed farming systems [46]. These semi-natural small-scale farmed landscapes are of significant economic importance. For example, the 1 million

holdings between 1 and 10 hectares (3.1 million hectares, 20% of Romania's agricultural area) are classed as semi-subsistence farms producing for home consumption, local sales and for their extended families [46].

Romania is one of the Central and Eastern European countries for which the development of rural tourism is a viable option for sustainable economic development [2]. The importance of rural tourism for the Romanian economy is recognized in its national tourism strategies. To support the niche of rural tourism, some associations have been developed over the past three decades in Romania, such as The Romanian Villages Association (created in 1988–1989), The Romanian Mountain Development Federation (1990), The National Rural, Ecologic and Cultural Tourism Association from Romania (1994), The Configuration and Innovation Centre for Carpathian Development (CEFIDEC) (1994), The Romanian Agritourism Agency (1995), ANTREC (National Association for Rural, Ecological and Cultural Tourism in Romania) (2007) [47].

Romanian rural tourism is highlighted by its tourist resources and by the non-abolition of the Romanian villages that have kept their uniqueness, both in terms of architecture and habits. In addition, the Romanian rural area where this niche tourism activity is suitable is in the vicinity or even overlapping with the localities or areas that are listed on the UNESCO list of monuments. In 2019, Romania had six cultural sites listed on the UNESCO World Heritage List and 2 natural sites [48].

However, the right question in developing sustainable rural tourism in Romania is the danger of over-tourism. If the limits are exceeded, the devastation of the rural landscape or its change to semi-urbanized may mean the end of tourist interest. The example of Czech villages in the Romanian Banat is also interesting [49]. Thanks to the ethical and religious separation of the surrounding Romanian villages, the traditional way of life, which has already disappeared in the Czech Republic, has been maintained in these villages. Therefore, after 1990, these villages were frequently visited by Czech tourists. However, revenues from tourism have enabled locals to improve the appearance of their villages, the quality of living and to adapt to global trends, so the main motivation for visits has disappeared. It may therefore be that the development of tourism, albeit initially permaculturally, may eventually engulf itself or change into a commercial one.

Braşov County is one of the most varied areas in Romania in terms of tourism potential, due to its natural resources (nature monuments, natural reserves, national parks) as well as its cultural-historical resources (cities, castles, churches, museums, etc). The mountains and hills represent almost half of the county's surface [50], this natural resource offering one of the most intact biodiversity in Europe, as well as the possibility of forming ecological tourism packages.

According to the Tourism Development Strategy in Braşov County 2020–2030, rural tourism is one of the most effective solutions for harmonizing tourism requirements with the principles of environmental protection and sustainable development. Also, Braşov County occupies the first place concerning accommodation capacities approved by ANTREC. The beauty of the rural area and cultural conservation make this area attractive for both domestic and international tourism. In recent years, rural tourism had a spectacular development [51]. According to the same source, rural tourism finds its followers among those interested in retreating in nature, the absence of mechanized environment and noise pollution, the return to authenticity and traditions. Agritourism is practiced especially around Bran villages (Fundata, Moieciu, Bran) and in Poiana Mărului—areas with a special natural, historical and tourist potential—as well as in the Săcele-Târlungeni area, located in the immediate vicinity of Braşov. This specific form of rural tourism is based on providing—within the peasant household—accommodation, meals, leisure, and other services complementary to them, being practised by small landowners in rural areas, usually as a secondary activity. Guests can enjoy an authentic rural experience in the villages of Viscri, Crit, Bunesti: traditional architecture and furniture, natural food, traditions, crafts, and the unique experience of the rural lifestyle. Traditional Saxon guest houses retain the original furniture and authentic, traditional architecture with minimal interventions to

achieve contemporary standards of hygiene (bathroom, etc.). In addition to fortresses and fortified churches, guests can enjoy nature, with various hiking trails available. For those who want a complete experience, visits to craftsmen, cart rides, waiting for the herd of cattle, and visits to the sheepfold are organized [52].

### 3.2. Research Methodology

The purpose of this research is to find if the stakeholders involved in rural tourism (primary producers of ecological goods, tourism service providers, and tourists, as carriers of the demand for tangible products and ecological services) are concerned with integrating the principles and values of sustainable tourism through elements that define permaculture and downshifting. With this aim, exploratory qualitative research was carried out, aimed at understanding the attitudes, opinions, beliefs and behaviors of individuals or groups of people regarding the importance of permaculture and downshifting characteristics in developing rural tourism and rural areas.

The choice for this type of research was determined by previous results obtained through similar research, as the qualitative research is adequate to the purpose and objectives formulated by several authors. For example, in a study on the perception of sustainability in Turkey, qualitative research highlighted the fact that companies do not pay attention to sustainability matters, even though they have stated that sustainability matters, without being considered an essential ingredient for the tourism industry [53]. In choosing the type and methods of research it was considered that qualitative research helps to appreciate the nature, history, and socio-cultural contexts of specific cases. Thus, as presented in the literature, qualitative research deals with a system of action rather than an individual or a group of individuals [54], facilitating research that seeks to understand the interactions of stakeholders more than their voice and perspective [55], the tourism offer being approached mainly as a cluster problem [56].

The research method was the interview, the investigation techniques were the in-depth interview and observation. The used procedure was the semi-structured interview, respectively the analysis of the data from secondary sources. The interview guide was used as an investigative tool. By the observation method, the research units that formed the sampling base were identified.

The sampling base consisted of 383 agritourism guesthouses and 236 classic and traditional restaurants in areas with ecological potential in Braşov County as well as 345 guides with a certificate in mountain tourism, ecotourism and natural habitat selected from the official lists published on the website of National Tourism Authority, within the Ministry of Economy, Energy and Business Environment [57]. The researchers opted for the quota method in the sampling process, as it has several advantages in the qualitative method [58]. Regarding the sample, a concept developed in the literature was adopted, according to which, at a certain level of experience, an approximation of the size and an evaluation can be made during the research, without it being possible to determine the sample size through a formula [59]. The sample included 33 subjects chosen by the research team, based on an analysis of their characteristics and compatibility with the general purpose and the objectives of the research. After randomly establishing the environmentally friendly tourism service providers (five agritourism guesthouses, three restaurants, and five guides) that would be part of the sample, the “snowball” method was used to complete the sample with other categories of participants. The representatives of the tourism companies were asked to recommend some suppliers of ecological products (primary producers of ecological goods), as well as tourists with ecological orientation. In this way, the sample was structured in three categories of interviewed people (P–primary producers, B–services providers from “business category”, and T–tourists) from Braşov and the surrounding rural areas (Table 1).



Table 1. Sample structure in qualitative research.

Code	Research Unit	Category
P1	Household 1, Măgura village	Cheese producer
P2	Household 2, Măgura village	Dairy producer
P3	Household 1, Cincșor village	Cheese producer
P4	Household, Viștișoara village	Manufacturer of poultry products
P5	Household, Predeluț village	Trout breeder
P6	Household 2, Cincșor village	Apple juice producer
P7	Household 1, Viscri village	Home-bread producer
P8	Household 2, Viscri village	Manufacturer of handicraft products
P9	Household 3, Viscri village	Home-made cookies producer
P10–P11	Household 4 and 5, Viscri village	Manufacturer of handicraft products
P12	Household, Vama Buzăului village	Home-made cookies producer
B1	Agritourism guesthouse, Măgura village	Agritourism services provider
B2	Restaurant, comuna Bran village	Tourism services provider
B3	Agritourism guesthouse, Predeluț village	Agritourism services provider
B4	Agritourism guesthouse, Viștișoara village	Agritourism services provider
B5	Agritourism guesthouse, Cincșor village	Agritourism services provider
B6–B8	Tourism guides 1–3, Brașov city	Tourism services provider
B9	Agritourism complex, Cobor village	Agritourism services provider
B10	Restaurant, Viscri village	Agritourism services provider
B11	Tourism guide 3 Moeciu de Sus village	Tourism services provider
B12	Tourism guide, Brașov city	Tourism services provider
B13	Restaurant, Brașov metropolitan area	Tourism services provider
T1	Tourist	Romanian tourist from eco-destinations, male, 49 years old
T2	Tourist	Romanian tourist from eco-destinations, female, 36 years old
T3	Tourist	Romanian tourist from eco-destinations, female, 43 years old
T4	Tourist	Romanian tourist, female, 51 years old
T5	Tourist	Romanian tourist from eco-destinations, female, 22 years old
T6	Tourist	Romanian tourist from eco-destinations, male, 28 years old
T7	Tourist	Romanian tourist from eco-destinations, male, 38 years old
T8	Tourist	Romanian tourist from eco-destinations, female, 47 years old

Note: P<sub>i</sub>—primary producer; B<sub>i</sub>—services provider from the “business” category; T<sub>i</sub>—tourist.

A rural configuration deals with the semi-coherent set of rules that orient and coordinate the activities of the rural stakeholders. On the one hand, stakeholders enact, instantiate, and draw upon rules in concrete actions in local practices; on the other hand, rules configure stakeholders [60].

In the case of rural tourism, producers and services providers are part of this rural configuration designed to satisfy tourists needs. Most producers and services providers

are small or medium-sized businesses (mostly small farms or family businesses) [61]. These stakeholders are usually people who love farming and who have a strong desire to continue with it, to renew it, to make it match new societal demands and be viable for the next generation [62].

Tourists are becoming stakeholders involved in the creation of tourism products [63]. Whilst “experiential” has become a buzz word in tourism marketing, tourism professionals are stressing the need to meet tourists’ expectations with a provision that is based on a total and sincere commitment that goes beyond the classic boundaries of business and pleasure [64]. Rural tourism is not an exception. That is why one of the most important stakeholders in rural tourism are tourists.

An interview guide was developed, taking into consideration the main aspects that are defining the two phenomena and their impact in rural tourism in the considered area—care for the earth, fair sharing, care for people, the balance between material and spiritual values, integration in nature and ecological lifestyle, the value of local culture, ecological certification, and communication. To let the interviewed people express themselves in a free manner, the researchers established, also, a section where the participants were permitted to identify and explain other elements that they consider important in their opinion (see Figure 1—The interview guide flowchart).

The interview guide was designed using the stair-climbing technique [65], the questions being asked in a logical sequence that exhausts all the aspects closely related to the investigated subject. The interviews were conducted at the participating locations. The duration of the interviews ranged from 50 to 60 min. The interviews began with an introductory discussion in which the aspects of confidentiality were presented, the way the interviews were recorded, from each participant the informed consent was obtained verbally, and the purpose of the research was stated. During the interviews, the research participants were urged to provide detailed information on all the discussed topics [66] until the researchers considered that a thorough understanding of the topic had been reached.

For data analysis and interpretation, we used content analysis, summarizing the answers through keywords. The analysis of the vertical content helped to determine the way in which each participant approaches the aspects related to ecology, offering a clear image of each entity. The horizontal analysis offered the possibility to analyze the answers on each topic and to draw important conclusions regarding the design of profiles within which the “stakeholders” involved in the eco-value chain in the tourism field can be included.

As Figure 1 shows, the qualitative research focused on the aspects that give the essence of the two concepts considered as important sources of the development of rural tourism in Braşov County: permaculture and downshifting. From the interview guide flowchart, the common elements and the interaction between permaculture and downshifting also emerge. Therefore, these elements confirm the validity of the concept of permaculture downshifters [28]. The interview participants were not explicitly introduced to the concepts of permaculture and downshifting, these concepts resulting from the authors’ analysis of the content of the interviews. By processing the answers to the questions asked, the Results section will highlight the key issues related to permaculture and those related to downshifting.

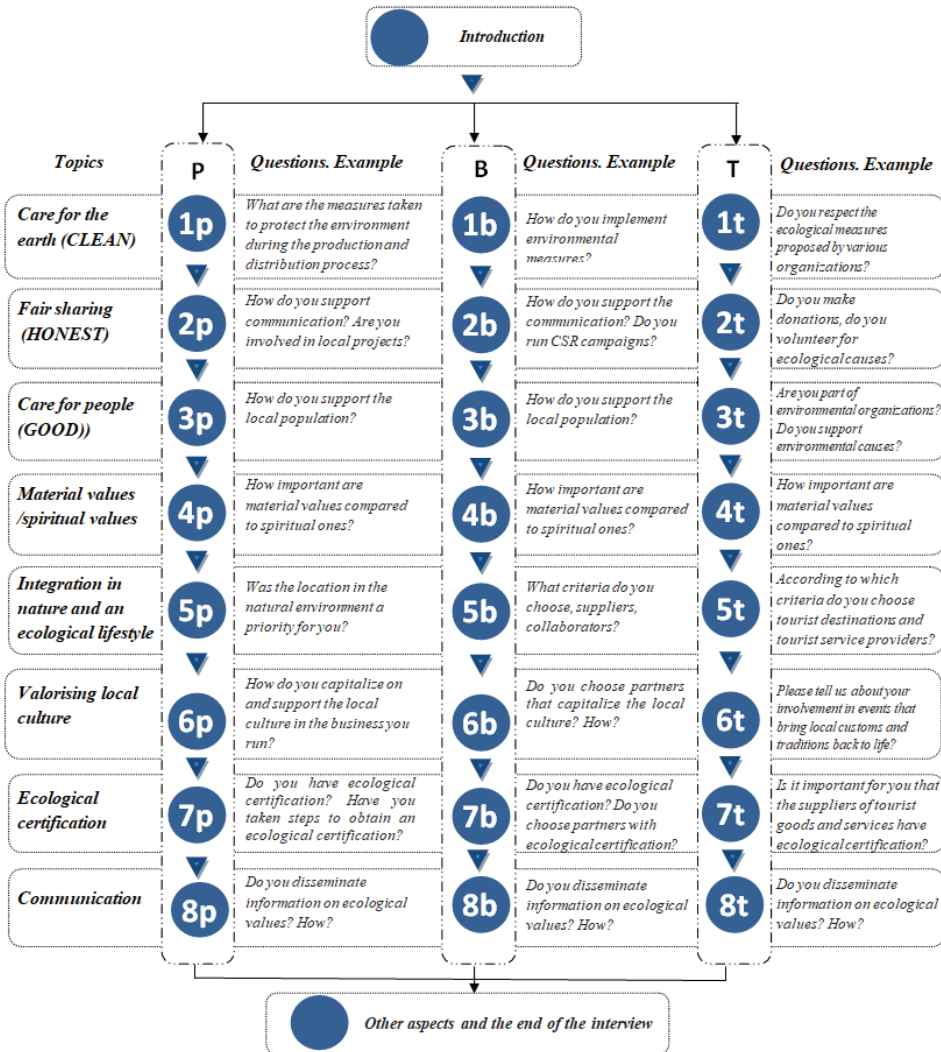


Figure 1. The interview guide flowchart.

#### 4. Results

Through the qualitative research carried out, the researchers found important information regarding the importance of permaculture and downshifting in Braşov County. The three parts involved in rural tourism through permaculture and downshifting (P—Local producers and service providers; B—Intermediaries: travel agents, independent tour guides, accommodation units and food services providers; T—Tourists) highlighted several common and specific aspects about these two phenomena and they expressed their opinion on the use of permaculture and downshifting for developing the rural communities with touristic potential.

#### 4.1. General Results

Permaculture and downshifting create special interconnections which determine specificity to the distribution networks. As it results from the respondent's opinion, distribution networks are naturally formed, over time, *"as a root that grows and spreads freely in a natural area enjoying the effects of symbiosis"* [#B4] between locals (P)-tourism service providers (B)-tourists (T) under the influence of nature, culture, and spiritual values. The research participants are aware that the total value of tourism services provided because of permaculture and downshifting, based on the efforts of all the members of the distribution network (organizations, tourism companies but also local individuals). For the interviewed persons, each link within the distribution network has an essential contribution on creating ecological tourism product and they must take into considerations the permaculture and downshifting characteristics in each distribution link.

The shape of the networks is constantly changing. These may increase or, on the contrary, may be restricted depending on external environmental factors (legislative, technological, cultural, etc.). At the same time, the "mature"-*"immersed"* networks were identified in the ecological values as well as the "young" networks in a formation that share the ecological values and aspirations, but which they implement only to a small extent.

#### 4.2. Issues Related to Permaculture

The three essential elements specific to permaculture—care for the earth, fair sharing, and care for people—were found among the basic values of the respondents and their entire behavior is influenced by these principles.

Related to the first characteristic of permaculture—care for earth—, 9 (nine) respondents, who built or rehabilitated buildings for their tourism use, stated that the use of environmentally friendly construction and planning materials was a priority for them, and they endeavored to use as many organic or natural products as possible. *"I used wood and river stone where possible"* [#B3,4]. Additionally, as a matter of caring for the earth, the research participants considered themselves responsible for implementing ecological measures such as the proper behavior in nature, both in protected natural areas and during some touristic tours with the purpose of seeing wild animals in their natural habitat; reducing the number of tour participants in an attempt to disturb as little as possible the natural environment and to offer *"an authentic and personal experience, not a mass one, as in the case of large groups brought by some travel agencies"* [#B11]; *"I prefer the activities in which I can observe animals in their natural habitat, even if it means effort and waiting hours"* [#T4].; revealed one of the interviewed tourists while showing us the footage made during the trips from which he had just returned; collecting waste from the paths during the tours and through the responsible use of natural resources. The accommodation services providers try to facilitate the selective collection of waste *"Our tourists are taught to selectively collect at home and want to do the same on vacation"* [#B9]. Other environmental protection measures mentioned by the respondents is the *"collection of waste oil, use of all component parts of the raw material"*. [#B13]. Moreover, they are aware of their activity impact on the environment and they take actions to minimize it: *"I only go on marked paths with tourists, do not use shortcuts through the forest because any additional paths unnecessarily erode the soil"* [#B8]. So, characteristics of permaculture, are appreciated not only as sources of the welfare for tourists but, also, as sources for rural community welfare.

Fair sharing is reflected by the involvement in local projects and payment of tax liabilities, as well as involvement in CSR (Corporate Social Responsibility) campaigns. Even though a small number of research participants have said they are making donations, most of them are organizations seeking sponsorship, fair pricing, tailored to the purchasing possibilities of the tourists requesting them services can be considered as ethical actions. The revenues that the locals can obtain from the sale of surplus production are not affected by the commercial addition that an intermediary could claim because they are supported to sell directly to tourists. Tourists are also guided to purchase products and services directly from local producers at fair prices. *"If a tourist wants to purchase local products,*

*cheese, fruit, jam, etc., we indicate him the addresses of the locals that we know will have their own surplus production, or, if the tourist does not want to move, we call the locals to us”* [#B1]. One of the respondents—who represented the organization Țara Bârsei, founded to save the gastronomic heritage and to promote food and local products, presented a way that this organization used to participate in conducting social responsibility campaigns through encouraging local initiatives by promoting them on the Facebook page, providing food to charitable events, participation in different sport competitions conducted to support social causes.

Caring for people is revealed by supporting other community members and by using the local workforce. All respondents in the intermediate category (B) said they use local suppliers of tourist products and services, which, in turn, offer environmentally friendly products. *“As much as possible I try to choose suppliers using local, environmentally friendly products, I consider it to be one of the essential things to reach a kind of sustainable tourism.”* [#B11], *“I try to use only local suppliers of tourist products from rentals to local guides services where needed, some meals we serve to local producers—sheepfolds or the houses of people in the villages where we go.”* [#B12], said two of the research participants, who are conducting ecological tours in natural areas. Tourists participating in the research, unanimously, said they prefer to buy local products *“I do not bring supplies and do not buy from stores. I only buy products from the locals”* [#T7] revealed an interviewed tourist.

Another research participant said that in addition to the food produced from their own household *“acquires and capitalizes surplus production in the village gardens”* [#B13]. Also, with the support of locals, this organization offers guided tours in nature, walking or cart ride and camping, cycling tours, family activities and botanical tours.

Representing the community within the tourist village, brought back to life following an international media campaign—Viscri, one of the research participants presented how restaurant owners support locals by acquiring preferentially local products. He also argues that the actions of the authorities involved in tourism development have led to social benefits. During the last years, the number of socially assisted families has decreased significantly (from 47 families to just 2), by engaging tourism-related activities.

#### 4.3. Issues Related to Downshifting

One of the research participants, the representative of Foundation Conservation “Carpathia”, proposed creating a new wildlife reservation in the Southern part of the Romanian Carpathian Mountains, without bringing any environmental damage, bringing benefits both to him and to the local community. He presented how they provide organic or natural products: *“A tomato picked from the garden will always taste different from the products in a supermarket”*. According to him, it is the duty of every participant in ecological tourism to remind tourists *“how wonderful and how important food is especially in these modern times, where almost all food can be found at any time, in any supermarket”* [#B9]. To preserve the authenticity of the area, one of the respondents has rearranged several old houses, abandoned in the village, transforming them into comfortable and modern guest houses. The representative of this organization believes that *“every old piece of wood or stone reused carries an old story, which comes to life with the traditional restoration of the house”* [#B9].

Another research participant, representing one of the most appreciated tourist villages in Transylvania, Viscri, argues that, even though tourism is one of the main sources of income of the inhabitants, there is a unanimous concern to preserve the country’s lifestyle—*“We do not want to transform the locality into an area of commercial tourism”* [#P8]. He gave the example of an unwritten rule, unanimously accepted by the locals, to expose and sell the products crafted in their own backyard *“in order not to load the village’s streets with merchandise”* [#P8]. At the same time, the locals opted for an integration of the lifestyle that maintains the authenticity of the place and the relationship with nature: the streets were cobbled (even if they could have been paved), the houses are plastered with faded lime (local product), water is provided through a system of lakes whose construction is based on principles of permaculture. Residents are willing to contribute to

the preservation of balance through personal efforts and concessions: some of them have waived the ownership of their land to create an outside parking garage, which is intended for buses, which does not overcrowd the village streets and doesn't pollute the village air. Moreover, on a voluntary basis, the locals participate in directing the village's movement. Tourists appreciate the effort made by the locals and respect the unwritten rules "I don't even conceive the idea of parking the car inside the village. It would be like a sacrilege" [#T5].

#### 4.4. Related Issues Resulting from the Research—the Ecological Perspective

The research did not reveal only opinions about permaculture and downshifting, as the subjects are related to other aspects connected to the two phenomena, such as the ecological certification, the specific communication, and some ways in which they can contribute to the local development.

Most of the intermediary respondents have a personal ecological orientation perspective, they have been, or they still are active members of some nongovernmental organizations with environmental protection concerns. For example, all five ecotourism (ecological) services providers have stated that they organize tours in natural areas, which they present to tourists from "an ecological perspective" [#B6], most often with self-declared environmentalist tourists, who are responsible towards the visited nature and local communities and choose "experiences different from mass tourism" [#B7]. Some tourists are even specialists in forestry, biology, ornithology and require specialized information about the visited ecosystems. They appreciate the fact that Romania "still has a fascinating ecological capital, which is no longer found in many countries of the world (bears, wolves, lynx, biodiversity, virgin forests)" [#B8]. They increased their interest in ecological certification, which could lead to a reduction in the risk perceived by both tourists (T) and other members of the network (P) and (B). Most of the respondents in the intermediate category (B) are familiar with ecological certification systems but do not consider them "mandatory in the ecological procurement process" [#B7]. The development and regaining of ecological certification systems in Romania is also suggested. "Ecological certification is a quality stamp, and it would be good to have a more developed system, a larger network of ECO certified services" [#B12]. Some of the respondents considered advisable a "local, authentic certification" [#B11], specifying each destination, whereby tourists and tourism companies have the right to purchase locally produced products, with local products, suggesting the concept of "trace back to the grass thread" (e.g., buying dairy products made from cow's milk that graze in the visited Montana area, where the flora is specific and has different properties of flora in the field areas). Referring to the ecological certification, the member of Slow Food Țara Bârsei, a research participant said "we choose more local suppliers who have ecological concerns even if they do not have proof in this regard. We are interested in the quality of products and the supply flow. To be a long-term partnership" [#B13]. Also, most of the tourists participating in the research stated that they do not expect locals to obtain certifications, but they feel confident if an economic entity has such a certification. "I don't think it would be very difficult for local independent producers to obtain an ecological certification. I confidently consume local products even if they are not certified" [#T1], "I feel good to see that a restaurant I go to has an ecological certification" [#T3].

The respondents highlighted their attempts to communicating/sharing their specific experiences and their orientation in providing sustainable touristic products through capitalizing on ecological production in the virtual environment, playing the role of influencer or vlogger, making themed posts in the virtual environment.

## 5. Discussion

The main responses revealed that in the case of locals (local producers and service providers) as bidders, the care for the earth is highlighted in particular by giving up fertilizers and chemicals, integrating production in nature, minimizing the amount of non-degradable waste, ensuring crop complementarities, minimizing the consumption of

water and energy, the use of ecological materials of construction and arrangement, the use of renewable energy (through traditional methods), capitalizing on the local production.

Looking at intermediaries (travel agents, independent tour guides, accommodation units and food services providers), the care for the earth is expressed through the way of choosing the ecological suppliers, the interest for the ecological certification, the implementation of ecological measures and offering organic products. Fair sharing is mirrored by the way tourism services providers carry out their CSR campaigns and whether they pay their tax liabilities. Caring for people is quantified by the degree to which they provide support to other community members and employ a local workforce.

Tourists expressed their care for the earth through the way they respect the ecological values, the way they make ecological purchases, the way that they selectively collect the waste, the way that they show availability to pay extra for ecological products/services/ecological packaging, by supporting ecological causes and the fact that they report to authorities' different ecologic problems they observe. Participation in fair sharing is provided by the extent to which tourism service providers donate funds for ecological causes or participate in volunteering actions. Caring for people is manifested when they declare their membership in ecological associations/organizations or become opinion polls on ecological issues.

The research revealed certain preoccupations regarding some aspects specific to downshifting: minimizing the importance of material values and orientation towards spiritual values expressed by a minimalist design approach; re-use of objects; donations; practicing fair prices; supporting CSR campaigns; concern for spiritual life; integration in nature and an ecological lifestyle expressed by: localization in rural areas or near natural areas, use of natural materials, selective waste collection, choice of integrated suppliers in nature, purchase of natural materials products, purchase of products and services provided by bidders integrated in nature; capitalizing on the local culture expressed through: preserving local customs and traditions, preserving the traditional lifestyle, using and promoting traditional/local methods of production (gastronomic recipes, crafts, craft themes, etc.), choosing and promoting suppliers that preserve local customs, traditions and the traditional lifestyle, the use of traditional production methods, the expression of interest in local customs, traditions and the traditional lifestyle. These characteristics are present at each link of the distribution network (P, B, T).

According to the results obtained from the research, there is a significant difference between how caring for the earth and caring for people are addressed by locals (P) compared to intermediaries (B); the intermediaries, by their exposures, proved that they are more interested in these subjects than the locals. *"We organize waste-gathering campaigns often with local school students, to gather what their parents and grandparents simply throw in nature."* [#B1]. In this way, they act in several directions, such as a clean environment, a young, educated generation, a local community capable of understanding the needs of sustainable development.

In addition to permaculture values, downshifting is distinguished by minimizing the importance of material values and orientation towards spiritual values, integration in nature and an ecological lifestyle as well as capitalizing on local culture. From this perspective, Figure 2 shows a synthesis of the elements that give content to the concepts of permaculture and downshifting, as sources of tourism development in rural areas of Braşov County.

		P	B	T
		SUSTAINABLE RURAL DEVELOPMENT	PERMACULTURE	<b>Care for the earth - CLEAN</b>
<b>Fair sharing - HONEST</b>				
<b>Care for people - GOOD</b>				
DOWNSHIFTING	<b>Minimizing the importance of material values and orientation towards spiritual values</b>			
	<b>Nature integration and ecological lifestyle</b>			
	<b>Valorising local culture</b>			
	<b>Ecological certification</b>			
	<b>Communication</b>			

**Figure 2.** Elements that define permaculture and downshifting as sources of tourism development in rural areas of Brasov County. Source: Matrix developed by the authors. Notes: P—Local producers and service providers; B—Intermediaries: travel agents, independent tour guides, accommodation units and food services providers; T—Tourists.

To highlight the basic reasons and motivations that lead the interviewed subjects to share and respect permaculture and downshifting—described above—, a synthesis of the answers was performed. The research conclusions lead to the idea that, in the studied rural area, the participants in the tourism activities respect and integrate the principles of permaculture (care for the earth, fair sharing, and care for people) and characteristics of downshifting (minimizing the importance of material values and orientation towards spiritual values, nature integration and an ecological lifestyle and valorizing local culture). In addition, applying ecological certification and communication, they may contribute to the wellbeing and development of the rural community. The summary results of this analysis are synthesized in a matrix that highlights all the discussed issues (Figure 2).

As the matrix reveals, the motivations of the interviewees are based on two categories of elements that are sources of sustainability in rural development through tourism: the ethics and the principles of permaculture and the orientation towards downshifting and spiritual values. To contribute to the sustainable development of rural areas, all these specific principles and values must be completed by other supplementary elements (such as communication and ecological certification).

### 6. Conclusions

The decisive force for rural transformation is the transition to a post-productive society, which in rural areas, is characterized, among other things, by the reorientation of the economics from agriculture to tourism. The rural landscape is becoming an agricultural production area into a consumption area for tourism and housing. The concepts of permaculture and downshifting have emerged—as detailed in the article—based on the refusal of people to consider material values as defining elements of their existence, instead preferring the idea of the quality of life and protection of nature. People attached to these values express themselves both through the behavior in the production of goods and services in general and, also, in the sphere of consumption of environmentally friendly tourist goods and services. Their lifestyle, shown in the professional and personal sphere, has contributed, over time, to changes in tourist demand. More and more, people are taking time to visit rural areas, to understand local people and the local traditions, to consume organic products produced in the community, to integrate with nature and to build an ecological lifestyle. These activities are facilitated by rural tourism, which becomes a certain solution for the local development of some tourism areas. The article has highlighted



some ways that permaculture and downshifting—as possible sources to develop rural tourism—can contribute to rural development.

The research brings the first element of novelty, by highlighting the specific involvement of each link between the components of the networks of the supply chain in this case: primary producers of organic goods, ecological tourist service providers, and tourists, as carriers of demand for tangible products and ecological services. Several elements specific to distribution in rural tourism have been identified, leading to the shaping of environmentally sound networks, based on specific concepts, such as good, clean, ethical, nature integration, local culture, and communication.

Permaculture and downshifting are defined not only by the theoretical elements highlighted in the literature but, also, by specific issues revealed in the research that subscribe in a clear manner these networks in a “green framework”—orientation to spiritual values, nature integration, ecological lifestyle, valorizing local culture. Permaculture and downshifting mean not only planned exploitation of the rural resources but, also, the valorization of natural and cultural heritage, as other studies revealed [67].

Another element of novelty brought by the research is represented by the creation of a possible system of measurement/appreciation of the characteristics that network stakeholders possess. The results were gathered in a matrix that integrates the theoretical characteristics (coming from the literature) and the specific characteristics (found from the involved stakeholders), with the possibility to assign levels of evaluation to appreciate the degree to which the elements within it are held. Such a tool may be used by all the involved stakeholders—primary producers of organic goods, ecological tourist service providers, tourists, and local authorities—to create tourist products in accordance with the requirements of consumers in rural tourism and to contribute to rural development.

The research results revealed some aspects that could guide us to the following conclusions:

- a. The main implications of the research consist of finding the elements of rural development in County through practices of downshifting and permaculture. As it results from the research, they might be appreciated as “good practices” in the implementation of sustainable rural tourism, because they create tourism products in balance with nature, with care for people, with the ecological lifestyle. They contribute to the conservation of the environment and the agricultural system in which they take place, and these ideas are in concordance with the results of other studies [65].
- b. Some specific aspects of downshifting were highlighted by all the categories of the stakeholders.
- c. Regarding permaculture, stakeholders are preoccupied to respect its principles, but there are different perspectives regarding these principles among respondents.

These conclusions are in concordance with previous studies [29,30,32,33] but the research brought into attention a more detailed perspective, since it pointed out these aspects on different categories of stakeholders involved in rural tourism (local producers and service providers; intermediaries and tourists). This might be considered not only a novelty element but also an element of added value.

The results of the present study provide a series of practical implications for different categories of stakeholders from rural destinations. Public authorities from local, regional (county), and national levels, in cooperation with representatives from non-governmental organizations, may consider promoting downshifting and permaculture as good practices in the implementation of sustainable rural tourism. Several campaigns (online and offline) may be organized to raise the awareness of different categories of rural tourism stakeholders regarding the perspectives of approaching these good practices in their rural tourism activities. Connecting different categories of rural tourism stakeholders interested in downshifting and permaculture in online communities and groups may also support the implementation of these concepts in rural destinations.

Despite its contribution to the academic studies on rural tourism, the present study has some limitations, which open the path for future studies which may address these issues.

The main limitation is related to the fact that it is focused on a single region (Braşov County) and country (Romania). Future research may be based on international studies, including comparisons between different regions/countries. Such an approach may provide supplementary information on the perspectives of sustainable tourism development in rural areas. Another limitation is given by the qualitative research method. Other researchers may consider conducting surveys, to be able to generalize the results. Furthermore, the interviewed rural stakeholders are representatives of the private sector or consumers. Governmental authorities were not included in the qualitative research. Therefore, future studies may consider analysing the perspectives of both private and public representatives regarding the implementation of sustainable rural tourism, through permaculture and downshifting.

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## Article

# Cultural Ecosystem Services: The Case of Coastal-Rural Area (Nemunas Delta and Curonian Lagoon, Lithuania)

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**Abstract:** The benefits or harms of external and internal consequences for the viability of ecosystems are revealed through the impact on the quality of human life. The issues of assessing these benefits or harms are significant for the whole society and are therefore analyzed from both theoretical and practical perspectives. The article seeks to theoretically examine the coherence between humans and ecosystems, ensuring the social and economic well-being of present and future generations in the context of cultural ecosystem services (CES). As well, the article seeks to present the empirical research, carried out on the possibilities of adapting human activities to CES in the specific area, i.e., coastal-rural area, evaluating the past, present and future CES potential in the Lithuanian coastal zone, Nemunas Delta and Curonian Lagoon in Lithuania. Elderships located near the Curonian Lagoon or within the protected area of the Nemunas Delta Regional Park were selected for the study. For this purpose, the empirical study involved representatives of different (public and private) sectors and stakeholders. The research was carried out in local tourism cultural centers and elderships with four group respondents (tourists, farmers, entrepreneurs, eldership employees). The research revealed the past and the current situation of CES potential and showed the possible CES potential future development directions. The article described the opportunities for the rural population (a potential supply of cultural ecosystems) to achieve diversification of economic activities and the needs of tourists (a potential demand for cultural ecosystems) to achieve service differentiation. Therefore, the recommendations have been formulated on how to exploit future CES of a specific territory by “employing” available natural resources, i.e., the ecosystems.

**Keywords:** cultural ecosystem services; ecosystem; Nemunas Delta; Curonian Lagoon



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## 1. Introduction

The main challenge of the 21st century is to create economic, social, and environmental management mechanisms that would ensure current and future human well-being. Today, all sectors mainly focus on the following aspects: raising awareness of the interdependence of ecosystems and human well-being; science, which includes basic interdisciplinary knowledge of ecosystems and the implementation of this science in decision-making to restore ecosystem services and their sustainable use in the future. However, the successful implementation of economic, social, and environmental management mechanisms is still in the initial stage. Therefore, strategic decisions by the leaders of the government, business, and civil society are necessary for the establishment of theoretical and practical measures to increase the functionality of services provided by ecosystems.

For millennia, ecosystems have been useful for human well-being not only because of their tangible but also because of their intangible assets known as cultural ecosystem services (hereinafter—CES). According to Mowat and Rhodes [1], cultural ecosystem services make an important and valuable contribution to human well-being. Spanou et al. [2] note, that CES are increasingly central in understanding individual and community connections to ecosystems. Today, CES are identified as intangible ecosystem services

that meet the diverse cultural, social, and emotional needs of humans and refer to the nonmaterial benefits people obtain from ecosystems [3–9]. CES is a growing field of research characterized by a growing number of different academic disciplines: ecology, economics, and the social sciences [10,11]. Relevant research topics for the above services are related to the development and research of CES assessment methods [12], etc. According to scientific analysis, CES are suitable as a means of bridging the gap between different academic disciplines and scientific communities. Taking advantage of the social importance of CES, real problems could be solved by promoting new conceptual connections between alternative logic related to various social, cultural, and ecological (environmental) problems. CES are more comprehensible and meaningful to people than many other services.

Despite recent research, the assessment of CES still remains very individual and largely limited to the most in-demand tourism services. The article seeks to theoretically examine the coherence between humans and ecosystems, ensuring the social and economic well-being of present and future generations in the context of cultural ecosystem services (CES). As well, the article seeks to present the empirical research, carried out on the possibilities of adapting human activities to CES in the specific area, i.e., coastal-rural area, evaluating the past, present, and future CES potential in the Lithuanian coastal zone, Nemunas Delta and Curonian Lagoon in Lithuania.

The work of this article is organized as follows: in further sections, the literature review, divided into two subsections; the research setting, materials and methods, divided into two subsections. Additionally, results; discussion and recommendations; conclusions sections are presented.

## 2. Literature Review

### 2.1. Theoretical CES Insights

Lithuania has one important tourism resource—nature, also ecosystems created by it, where tourism infrastructure is formed, rural communities live, people of the city and foreign tourists looking for a quiet rest come, etc. Therefore, the services provided by local ecosystems should be treated as opportunities for the development of activities in suburban, remote, and protected areas, etc. It has been noticed that the importance of agriculture as the main economic activity of the rural population is changing in Lithuania as well as in other European countries. The rural population is forced to look for additional activities to replenish financial resources. Place-based communities are struggling to maintain their connections to land and water, including the social and cultural practices that are rooted in a particular landscape [13]. The prevailing opinion is that the need for diversification of economic activities in the 21st century is determined by such factors as social (emigration of young people, aging farmers, rising unemployment, quality of life gap between urban and rural areas), economic (declining farm profitability, insufficient development of rural economic activities), political (financial mechanisms to promote farm diversification in rural areas), geographical (landscape, land-use productivity, infrastructure), etc.

According to research data [14–19], more and more rural residents would like to diversify their economic activities by creating additional sources of income in addition to agricultural activities, gradually abandoning them altogether. These statements are confirmed by the EU's goal to increase the income of the rural population from non-traditional agriculture or alternative activities to agriculture. The implementation requires not only financial support but also the motivation of the rural population itself; therefore, gradual abandonment of intensive farming raises the following question: what alternative activities can be chosen with available resources? Rural tourism is recommended as one of the forms of activity, promoting tourism business, increasing the variety of services, for a citizen or foreign guest vacationing in the countryside. It should be emphasized that tourism services should help to address social, economic, and environmental problems by providing an alternative source of livelihood for the rural population and helping to preserve the natural values associated with the preservation of ecosystems.

Based on the Convention for the Protection of the World Cultural and Natural Heritage in the United Nations Agenda 2030 for Sustainable Development, the Recommendations On The Historic Urban Landscape, Comprehensive Plan of the Territory of the Republic of Lithuania—Vision for 2050 [20–22], assessing cultural heritage through the historical landscape (including associative natural) and socio-cultural dimensions, CES were chosen as the research object, updating nature, heritage and traditions, looking for opportunities to increase accessibility and attractiveness of cultural heritage objects, preserving and meaningful cultural heritage sites in a specific area.

The solution to this problem requires the help of certain specialists and strategists (tourism business, marketing, nature protection, etc.), identifying disturbances in the development of a particular area and providing recommendations on the most efficient methods of joint efforts to develop services in the rural areas. A lack of cooperation between institutions and businesses is one of the main problems. Although the owner of a rural tourism homestead is likely to list valuable natural objects nearby, he or she can rarely offer a wide range of entertainment for a tourist for a long weekend or the whole week. Similarly, nature conservationists often shrug their shoulders when asked why so little information about their cognitive, cultural tourism and other events and activities is available to tourists. They often reply that they are not responsible for marketing.

The ecosystem is the complex and dynamic combination of plants, animals, microorganisms, and the natural environment that coexist as a whole and depend on each other. Ecosystem functions “become” services when a socio-economic interest arises, i.e., when a function is identified as having “benefits” (human mental and physical health, social life, the satisfaction of general needs, etc.) and “value” (economic, social, health, etc.). Human activities (or drivers of change) can have direct (e.g., climate change) and indirect (e.g., demographic change) impacts for human well-being on both ecosystems and human well-being. Human wellbeing can also influence indirect drivers of change, e.g., demographic situation, technological progress, social change, etc. According to De Bello et al. [23], the benefits of ecosystems can be perceived and incomprehensible. Perceptions of the value of an ecosystem are experienced (felt) and the benefits of the ecosystem to people in the local context are recognized. For example, microclimate regulation services provided by a city park is clearly felt by a person in that place.

Ecosystem services can also be understood as an interface between people and nature, which is illustrated by the so-called cascade model [6,24–26]. This model describes the causal interrelationships between ecosystems on one side and human well-being on the other. In this model, ecosystems are described through their biophysical structures and processes. Biophysical structures can more easily be called habitat types (e.g., forests, wetlands, meadows, etc.) and processes are the dynamics and relationships that form the ecosystem (e.g., primary production). Ecosystem functions in the context of a cascade model can be understood as features or behavior of ecosystems that support their capacity to provide ecosystem services (i.e., the ability of forests or grasslands to generate permanent biomass stocks). These elements and features required for the capacity of ecosystems to provide services are sometimes referred to as “supportive” or “intermediate” services, and “final” ecosystem services are what we can harvest as “harvested” (e.g., hay, timber, etc.) or benefits of ecosystems (e.g., flood protection, beautiful landscape, etc.). End-to-end services directly contribute to people’s well-being through benefits (e.g., health and safety). People are accustomed to attributing some value to such benefits for the benefits they receive. As a result, benefits are often referred to as goods or products, and value can be expressed in monetary terms, but also in moral, aesthetic, or other qualitative criteria.

Several different typologies and approaches have been developed to categorize ecosystem services, using different criteria such as spatial characteristics and scale, service flows, service recipients (private or public), type of benefit received (used or not used), and whether the service is used. As well according to whether the services are used for one person or group affects the ability of others to use them (competitive and non-competitive). One way to classify ecosystem services is to raise public awareness of the benefits of



ecosystems to humans. This approach was also the basis of the Millennium Ecosystem Assessment [16] classification system. This method of classifying ecosystem services consists of four main categories of ecosystem services: supply services—food, materials, and energy, i.e., things that people can use directly, supporting services—the ecosystem processes and functions on which the types of services are based, regulatory services—services by which ecosystems regulate the environment and its processes, cultural services—services that are related to the cultural or spiritual needs of people.

CES are most often associated with tangible and intangible ecosystem services, meeting the diverse cultural, social, and emotional needs of people. Recreation, inspiration found in nature, aesthetic, spiritual satisfaction, traditions, connection with place—these are the most important and the easily understandable values provided by nature.

Scientists argue that CES arise only from the perception of people, and cultural services would not exist without human perception of one or another benefit. They are intangible, so they are influenced by people's understanding and activity priorities. In principle, as Fish et al. [11] notice, CES provide a way in which the cultural dimension of ecosystem contributions to human well-being can be utilized in decision making through standardized comparison with all other ecosystem services. As well, the highly interdisciplinary and socially constructed nature of the ES framework invites a series of ontological and epistemological challenges [27]. According to Hirons et al. [28], the intersections between nature, culture, value, and politics are extremely complex. Despite being intangible, subjective, and difficult to measure, as Tandaric et al. [29] notice. Thus, the CES field provides a methodological framework for identifying the “non-material” services that ecosystems can offer to people, such as aesthetic values, educational values, or tourism and recreation possibilities [30].

It's important to notice, that some practical site-specific CES assessment studies choose to examine those ecosystem services that are most characteristic for the study area, without seeking to account for absolutely all aspects of ecosystem services [31–37].

Researchers [8,30,38] note that the intangible benefits that ecosystems provide to humans are mostly studied in the field of CES. Human perception and valuation change for many reasons and in a variety of ways. There is a growing concern that the ecosystem services approach emphasizes the optimization of a small number of services, which may endanger environmental sustainability. It can be observed that the range, intensity, and selection priorities of CES used are among the most important parameters of the use of services. The above-mentioned parameters demonstrate the territorial distribution of services, supply (potential), current volume, quality, and possible threats to the quality of services and the possibilities of providing services in the future [24,26]. According to Wang et al. [39], recreation is found to be both a way of experiencing CESs and a component of CESs. Therefore, recreation, inspiration found in nature, aesthetic, spiritual satisfaction, traditions, connection with place—for many people these are the most important and easily understandable values provided by nature and considered as CES. Analyzing the function of CES, such as aesthetic evaluation and cultural inspiration, it should be emphasized that the changing motives of people to travel may influence the increased interest in folk and inherited archaic culture and traditions (old houses, their decoration, ornamentation, interior, etc.). Therefore, efforts are necessary to involve travelers in the process of cognition of the country's culture, highlighting agritourism and the importance of visiting ecological homesteads.

It seems important to mention, that Lithuania-neighboring countries also carry out research in CES. Beichler [40] discusses the case study on CES in an urban region on the Baltic Sea coast; Veidemane et al. [41] examine marine ES approach; Giedych and Maksymiuk [42] analyze the specific features of parks and their impact on regulation and CES Provision in Warsaw, Poland; Müller et al. [43] discuss their importance of CES and biodiversity for landscape visitors in the Biosphere Reserve Swabian Alb (Germany), etc. The ability of ecosystems to adapt to the changing conditions may reduce potential damage; some benefits may even be gained from new possibilities provided by the climate. Still,

when planning the methods of adaptation, one must not forget that there are no universal adaptation measures that would be suitable for the entire territory of the European Union (hereinafter—the EU) because different measures are used under varying local conditions. For this reason, in order to determine effective impact measures for the preservation of ecosystems and the services they provide, research must be conducted on the adaptation of human activities to the ecosystem services in a specific location.

## 2.2. CES Challenges and the Case of Lithuania

Due to the natural diversity, landscape, and clean and safe environment, Lithuania has a favorable potential for the development of nature tourism. With increasing unemployment in rural areas, it is suggested to link the development of rural areas (settlements) with the identification, strengthening, and development of their internal functional connections (strong communities, internal services) and external connections (services for urban centers, for ecologically important areas). Strong communities in many cases would be a key condition for the viability of rural areas, creating opportunities for activities that would be an alternative to the declining number of workers in the agricultural sector. It can be emphasized that the immovable cultural heritage and related infrastructure in agricultural areas should be developed by overcoming it, applying the principle of “storage through use” [44].

It can be noticed that there are a number of cultural heritage objects in Lithuania, but when assessing the country’s tourist areas, the emphasis should be placed on those objects that would be interesting for both local tourists and guests from abroad, representing the country’s culture, history, biological and landscape diversity. For example, in rural areas, a large part of the list of attractions includes churches, crosses; at the local level, these are significant historical religious, memorial objects, valuable from the point of view of the region, cognition of the place, historical memory. However, from the point of view of tourist attractiveness, these objects are seldom visited because information about them is either not available or the information is presented in a sufficiently primitive way and is of no interest to visitors.

As experts [45–48] note, tourist brochures or guides suggest tourists (especially in the regions) visit churches, but village and town churches are usually only open during the services (early morning and evening) and are therefore not open to visitors at any time. Some of them are architecturally interesting, but most of them have no greater cognitive value. In some churches, movable cultural heritage values (paintings, tombstones, sculptures, altars, church utensils, etc.) have survived but they are not exhibited. If they are to be exhibited, the protection of values should be ensured, which is difficult to do in rural churches.

It has been established that the websites of municipal administrations, elderships, tourist information centers, national and regional parks often offer dilapidated manor houses or homestead parks as places of interest. However, no one is waiting for a tourist in the former manor houses or parks, there are neither information nor tourism services. Therefore, very often manor homesteads in rural areas should be treated only as potential objects of tourism services to be developed, but today they do not provide any financial or cultural benefit.

The prevailing opinion is that most cultural and natural heritage sites are interesting from a scientific and cognitive perspective but are unattractive from the tourism organization’s point of view. For example, a list of cultural heritage monuments is dominated by mounds, burial mounds, and cemeteries, ancient villages. Once all the Lithuanian mounds have been arranged, they would become a unique part of the landscape. However, today a traveling tourist could see only a few of them in detail, and the preparation of cultural heritage monuments for a visit is very different. Most of them do not provide any services (catering, excursions, souvenirs, information).

It has been noticed that many natural monuments are inaccessible, i.e., they are far from roads (in the middle of forests) or accessible only by water (hydrographic), or

difficult to prepare for visits (exposures). For example, 30% of the proposed geological, hydrogeological, geomorphological, hydrographic, and botanical objects have a status of natural monuments but only 18% are ready for visiting.

Protected cultural heritage objects with the status of a monument, dissemination of national and regional parks, and protected landscape objects with the status of a natural monument were also analyzed. In certain areas, it is possible to notice their compaction, to distinguish the chains of objects, etc. Where the chains of monuments are visible, there are no roads. Where there is a higher density of monuments, the road network is sparser. This is due to the fact that a large part of cultural heritage objects with the status of a monument are archaeological objects (mounds, alcoves, ancient villages, burial mounds). Their spread is related to ancient land and waterways. It seems important to mention the study of Lithuanian tourism potential assessment determining the largest tourist attraction areas and priorities for their use [49], where the prevailing opinion is that the Lithuanian landscape and biological diversity are best represented by national and regional parks. National and regional parks are the places of interest that protect the Lithuanian landscapes and have many individual objects of interest. In order to overcome the above-mentioned areas, the employees of protected areas were encouraged to look for ways and means, to adapt ecologically fragile areas to the needs of tourists. On the other hand, they are natural complexes, the life, and activities of which should not be disturbed by a large flow of tourists, especially those traveling by car. When activating the possibilities of nature tourism activities, it should be borne in mind that sustainable tourism should be carried out in the developing area, taking into account how tourism affects local nature and local communities. However, it is unfortunate that the concept of sustainable tourism in Lithuania is still little known, there are attempts to develop the tourism business in a sustainable direction, but this is rather an individual initiative than a trend [50–52].

According to forecasts, with the total annual flow of tourists growing by about 5.5%, the demand for nature tourism will grow six times faster. This will be determined by the improving living standards of the population of many countries, increasing life expectancy, interest in a healthy lifestyle as well as the growing urban population, concerns about the human impact on the environment, and other reasons. Popular nature tourism is very important and useful for Lithuania, which is famous for NATURA 2000 territories, unique landscapes, rare plants, bird watching, and other activities in nature [51]. It can be observed that the popularity of nature tourism requires more attention to the development of tourism infrastructure, improving the quality of products and services offered. In Lithuania, little attention is paid to the development of more diverse nature tourism services (focused on active and cognitive leisure). In naming the attractiveness of nature tourism services, it is necessary to emphasize the environment, as there is an opportunity to be surrounded by nature and stay away from the noise of the city and people. Cognitive opportunities must also be kept in mind as vacationing in the countryside provides perfect opportunities to get to know the local community, the culture, and the area.

The impact of CES is usually intangible, difficult to measure and quantify. As a result, CES is also treated differently by different people or by different organizations representing different sectors of activity, the so-called stakeholders, both natural and legal persons. As different typologies and methods have been developed for the categorization of CES, which use different criteria, the selection of CES for the survey was based on the classification (the Common International Classification of Ecosystem Services—CICES 5.1 [53], Table 1) and existing and potential resources in the study area.

**Table 1.** Chosen cultural ecosystem services (CES) from classification by CICES (Common International Classification of Ecosystem Services, version 5.1).

Division	Group	Examples of Services
Direct, in-situ, and outdoor interactions with living systems that depend on presence in the environmental settings.	Physical and experiential interactions with wildlife.	Ecological forest features, making them attractive for hikers; diving, swimming opportunities; birds, animals, that nature lovers can enjoy watching, etc.
	Intellectual and representative interaction with wildlife.	Protected areas, areas where volunteering can be done, scenic routes; areas of exceptional natural beauty, objects in nature that allow people to identify with the history or culture of their place of origin, etc.
Indirect, remote, often indoor interactions with living systems that do not require presence in the environmental settings.	Spiritual, symbolic, and other interactions with natural environment.	Oak, Stork (e.g., Serpent), etc., as worshiped animal and plant species in traditional Lithuanian culture.
	Other biotic characteristics that have a non-use value.	Protected wildlife areas, endangered species or habitats, etc.

Due to the large number of CES services, only eight concrete services were selected for the study, such as: provision of recreation and recreation in nature, cultural heritage, aesthetic significance, religious significance, striving to preserve existing natural values, nature and ecological tourism, sightseeing tours, nature observation, cognition service, providing recreational fishing opportunities, providing material for research and cognition. These services were selected on the basis of the existing and potential natural, traditional, and heritage resources of the area, seeking to preserve and enhance them, making them accessible and attractive for visitors.

### 3. Research Setting, Materials, and Methods

#### 3.1. Research Setting

During the research, the potential of CES in the Nemunas Delta and the Curonian Lagoon and in the ~10 km zone from the shore in the rural areas were assessed. The Nemunas Delta begins 48 km from the mouth (below Tilžė), where the Nemunas branch into Rusnė and Gilija branches. Rusnė begins 13 km from the mouth (at Rusnė Island) branches into Atmata and Skirvytė. The plain of the Nemunas Delta is still being changed by the branches of the Nemunas and the delta of the Minija, Šyša, Tenenis, Leitė, and other rivers that have joined the Nemunas Delta. As sediments continue to form at the mouth of the Nemunas, the Nemunas Delta is gradually increasing and moving towards the Curonian Lagoon [54]. The Nemunas Delta is well known for its great biodiversity and in 1992 the Nemunas Delta Regional Park was established in order to preserve its original landscape, and natural and cultural heritage [55]. The Nemunas Delta is one of the few places in Lithuania and Europe where large floodplains of swampy deciduous forests—habitats of European importance—can still be seen. Many rare bird species protected in Lithuania and the European Union breed in the forest and wetland complexes (black stork, eagle roost, winch, great crested grebe, etc.). The area of the flooded area is about 400 km<sup>2</sup>. The coast is characterized by spring and autumn—winter floods. Floods usually occur in the spring, when the Nemunas flows out of the banks. The spring floods in the lower reaches of the Nemunas begin at the end of March and reach their maximum level 6–8 days after the river flows out of the riverbed. Spilled water and ice destroy embankments,

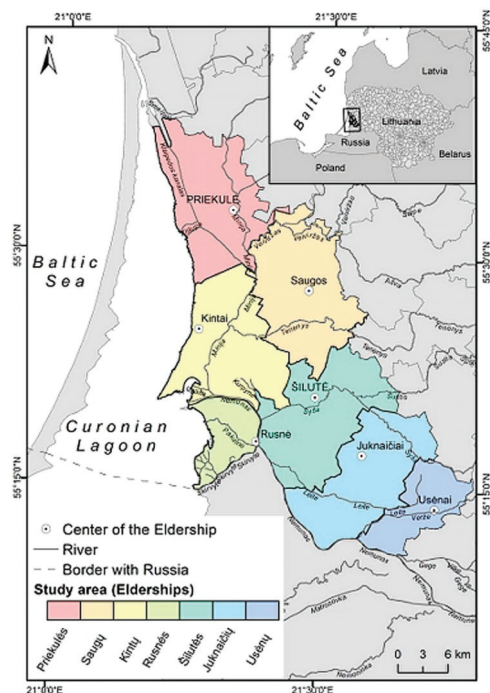
floods settlements, destroys roads, quays, and brings fertile land to sediment. Floods cause a lot of damage every year. During the major floods, more than 1500 people are flooded, and the flood is approaching the entrances to the city of Šilutė [54]. The Nemunas Delta is very important due to its natural landscape, ecosystem values, and economic value [55]. According to Atkocevičienė et al. [56], Nemunas Delta Regional Park and its surroundings is the land of the heritage of Lithuania Minor with its special history, unique scenery, original ethnocultural, and valuable cultural heritage: Villages and homesteads of Lithuania Minor were of greater variety than in Lithuania Propria as there were no forced rural restructuring which had a great impact on the establishment and development of villages, thus ancient villages had been preserved in Nemunas Delta Regional Park until the post-war period. These villages may be grouped not only by location, and names, but also by lifestyle peculiarities of villagers [56].

The Curonian Lagoon is the largest coastal lagoon in Europe with high nutrient loadings from the surrounding rivers [57], the large body of coastal water in the south-eastern is part of the Baltic Sea [58], and the 1584 km<sup>2</sup> coastal water body connected to the south-eastern Baltic Sea by a narrow (0.4–1.1 km.) strait, Klaipėda port area [59]. According to Jakimavičius and Kovalenkoviėnė [45], the Curonian Lagoon is the only and largest freshwater basin in Lithuania, a part of it belongs to Russia (1171 km<sup>2</sup>), whereas 413 km<sup>2</sup> is in the territory of Lithuania. The Curonian Lagoon is distinguished by its unique area, landscape, and fauna. During the development of Klaipėda State Seaport, the northern part of the Curonian Lagoon, connecting the lagoon with the Baltic Sea through a strait, was deepened; in addition, the quays have been reconstructed and newly built [60]. The authors [60] notice, that currently there are many discussions, debating the limits on the impact of natural processes and the anthropogenic impact. Therefore, there is a need to renew the water balance quotas of the Curonian Lagoon and global climate change, rising water levels may affect aquatic ecosystems [59].

Elderships located near the Curonian Lagoon or within the protected area of the Nemunas Delta Regional Park were selected for the study. The following seven elderships were distinguished: Priekulė, Saugai, Kintai, Rusnė, Šilutė, Juknaičiai, and Usenai (Figure 1).

For this purpose, the empirical study involved representatives of different (public and private) sectors and stakeholders. The main research was carried out in Kintai, Rusnė, Šilutė, and Dreverna tourism cultural centers (the main objectives of the tourism cultural centers are: to accumulate, preserve and popularize the spiritual and material values of ethnic culture and to adapt them to the needs of modern society; cultural tourism activities; to take care of the dissemination and popularization of ethnic culture; to educate, form the general culture of the society, to develop educational, non-formal education of children and adults, entertainment activities, to take care of the dissemination of professional art; to organize cultural activities in elderships [36]). Additionally, the research was carried out in Priekulė, Saugai, Kintai, Rusnė, Šilutė, Juknaičiai, and Usenai elderships, with local elders and eldership employees, with farmers and with entrepreneurs.

The empirical study was carried out on the possibilities of adapting human activities to CES in the specific area, i.e., coastal-rural area, evaluating the past, present, and future CES potential in the Lithuanian coastal zone, Nemunas Delta and Curonian Lagoon in Lithuania.



**Figure 1.** Distribution of cultural ecosystem services (CES) potential in the study area according to the generalized Common International Classification of Ecosystem Services (CICES) classification (distribution map made by J. Mezine).

### 3.2. Materials and Methods

The following data collection and analysis methods were used in the research: document analysis, questionnaire, and comparative analysis.

**Document analysis.** Having considered the object of the research (ecosystem services) as well as the goals and tasks of the research, this method is considered to be the most important method of data collection (method used to obtain data). Data sources: national, EU and international legislation, scientific books, and journals, press publications; official statistics (information provided by the Department of Statistics, municipalities, elderships, departments of protected areas); official government publications; documents of private, state, professional and other non-governmental organizations.

**Questionnaire.** In order to evaluate the existing problems of ecosystem protection and their services, a survey of respondents (tourists, farmers, entrepreneurs, eldership employees) was conducted and their opinions on ecosystem conservation and possible related problem areas were investigated, and the peculiarities of CES regulation and implementation were revealed. The questionnaire examined the advantages and disadvantages of socio-economic conditions (related to current or potential CES). Based on the survey, the following insights into the management of CES were provided: Contingent valuation method and Consumer choice experiments. The contingent valuation method was based on a survey of the users of CES in regard to their priorities for ecosystem services. A hypothetical market for potential CES has been created. Consumers (tourists) were asked about specific actions of their own (the ones that can be done by them) and were also asked questions about actions taken to maintain or improve the status of ecosystems. During consumer choice experiments, consumers of CES (tourists) had to choose potential (in their opinion) operation alternatives related to CES by 2030.

Comparative analysis. The comparative analysis has allowed the researchers to reveal the differences and similarities not only in the practice of the phenomena (e.g., ecosystem (biodiversity) conservation) in Lithuania, but also in the examples of “good practice” in various countries. It was necessary to take a close look at/to empathize with another cultural perspective, learn to understand the thinking processes of another culture and see it from the inside rather than from the outside (through the insider’s eyes), as well as evaluate the research phenomena in the country through the eyes of the impartial observer.

Research participants. In order to evaluate the existing problems of ecosystem protection and their services, a survey with four group respondents (tourists, farmers, entrepreneurs, eldership employees) was conducted. Tourists were the ones who visited the mentioned centers (85 respondents), aiming to evaluate the past, present, and future CES potential. The distribution of respondents (tourists) by countries was as follows: 56% were tourists from Lithuania, 31%—tourists from the EU countries, 5% each, from the UK, Norway, Russia, and Ukraine, and 3% from the USA. Analyzing the assigning of tourists into certain classified tourist groups, it was found that the largest share (49%) was made up of holidaymakers, 21%—active recreation lovers, 8%—entertainers and adventure seekers. Furthermore, the research was carried out in Priekulė, Saugai, Kintai, Rusnė, Šilutė, Juknaičiai, and Usėnai elderships, with local elders and eldership employees (11 respondents), with farmers (64 respondents) and with entrepreneurs (15 respondents). All respondents had to assess the potential of CES. A score scale from 1 to 5 was chosen for the evaluation (1—the most significant, 5—low significance). CES samples were selected based on literature analysis and expert opinion, according to the types of ecosystems in the study area. In this way, eight examples of services of CES were selected (Table 1) according to the CICES 5.1. classification.

#### 4. Results

According to research data, there is almost no service infrastructure necessary for traveling tourists in Juknaičiai, Saugai, Usėnai, regardless of the category of tourists (natural, recreational, etc.) they belong to. Unfortunately, in the studied areas (except for Rusnė, Dreverna, and Kintai), rural tourism is sluggish, there is a lack of beaches, an underdeveloped network of respite, rest areas and campsites, and poorly equipped and marked cycling routes.

Assessment of the CES potential in the past, present, future. During the research (Figure 2), the respondents had to assess the potential of CES of the past (2014–2017), of the present day (2018–2019, because the research was conducted during this period), and of the future (2020–2030). When assessing the potential of CES respondents had the possibility to choose the priority services, as seen in Figure 2.

Analyzing the opinions of farmers, it was found that in all the studied periods the provision of CES recreation and recreation in nature dominated—change from 1.42 (2014–2017) to 1.4 points (2020–2030). Eldership employees (2014–2017) singled out the desire to preserve existing natural values (1.5 points), and in 2018–2019 and 2020–2030—the provision of recreation and recreation in nature, 1.6 and 1.7 points, respectively. Entrepreneurs named the cultural heritage of CES change from 3 to 3.6 points in all study periods.

The survey also analyzed the opinions of respondents (both farmers and entrepreneurs) about the measures of public authorities that can help to preserve the provided CES, such as educational activities on natural topics (1.33 points), maintenance, preservation of cultural heritage, etc. (1.5 points), installation of information stands (1.66 points), stocking of water bodies (3 points).

Views on the future potential of supply CES. Analyzing the potential of CES (2020–2030) (Figure 3), in the opinion of farmers, the most significant services are as follows: provision of recreation and relaxation in nature (1.4 points), cultural heritage (1.8 points), aesthetic significance (2.4 points) and the desire to preserve the existing natural values (1.56 points).

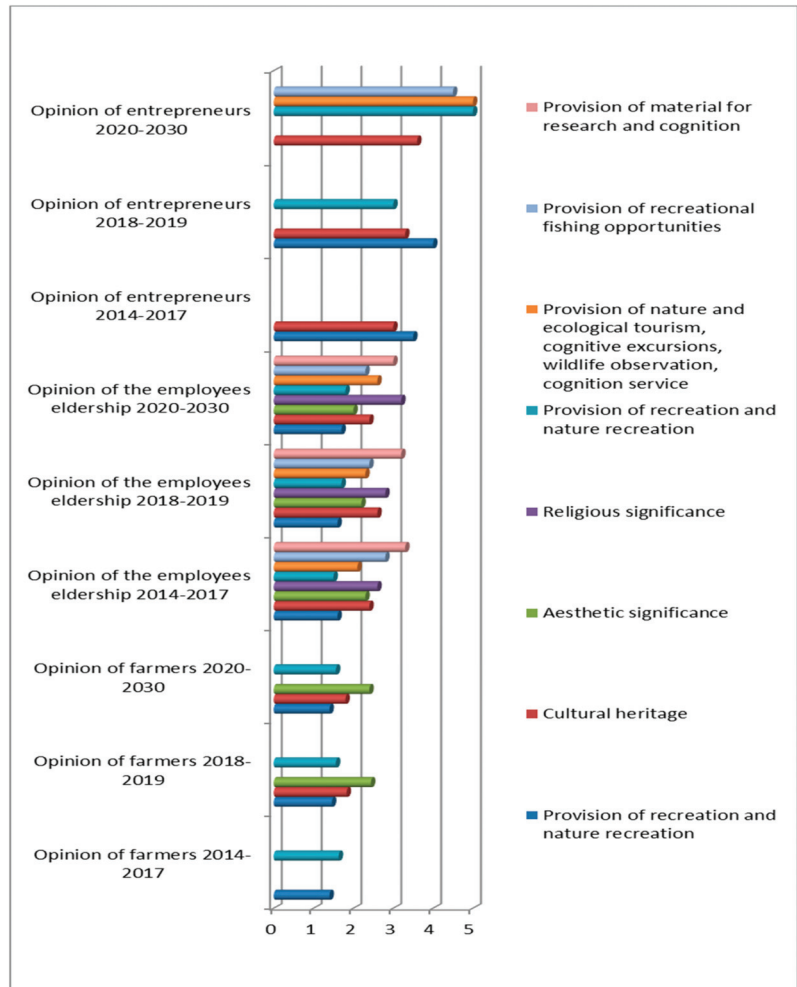


Figure 2. Respondents’ assessment of the potential of CES of the past (2014–2017), of the present day (2018–2019), and of the future (2020–2030).

According to business representatives, the priorities are as follows: cultural heritage (3.6 points), provision of recreational fishing opportunities (4.5 points), preservation of the existing natural values and natural and ecological tourism, cognitive excursions, observation of wildlife, and provision of cognitive services (each 5 points).

According to the employees of the eldership, the main attention should be paid to the provision of recreation and relaxation in nature (1.7 points), the desire to preserve the existing natural values (1.8 points), and the services of aesthetic significance (2 points). Meanwhile, tourists gave priority to nature and ecological tourism, cognitive excursions, nature observation, cognitive services (1.1 points), recreation and relaxation in nature (1.3 points), cultural heritage (1.8 points), and the desire to preserve the existing natural values (2.1 points).



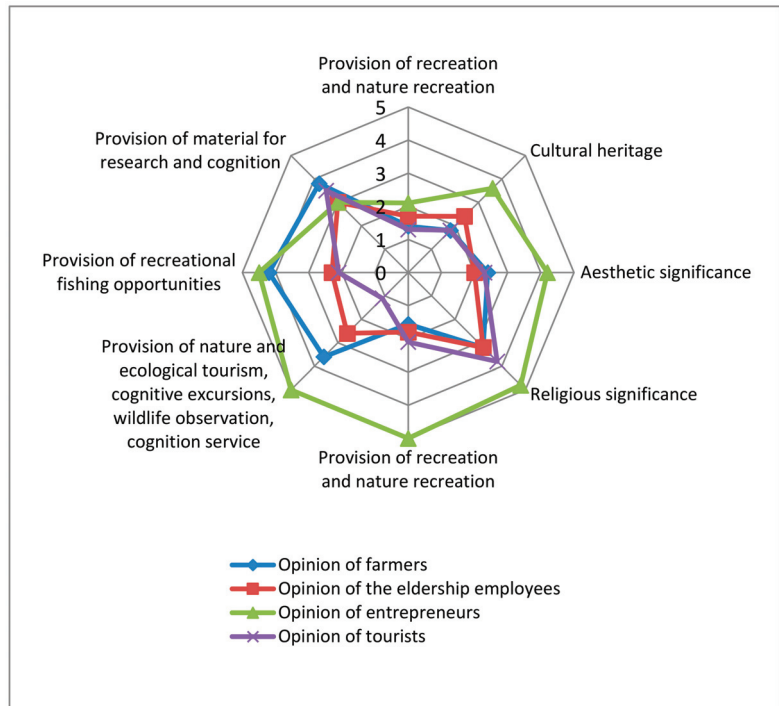


Figure 3. Respondents' views on the future (2020–2030) potential of supply CES, in score averages.

It was found that 52% of tourists visited protected areas (national and regional parks) for cognitive purposes. These data show a strong interest of tourists in learning about wildlife, biodiversity, natural landscapes and at the same time demonstrate good potential for more intensive use of these CES in the future, especially if (thanks to the study) the infrastructure of the study area for sustainable nature and ecological tourism, excursions and wildlife observation is improved. For example, wetlands were mentioned by as many as one-fifth of respondents (27%) as the most frequently visited habitats for nature cognition purposes. Undoubted results were obtained during the study due to the importance of the infrastructure adapted for visiting nature—75% of tourists said it is important for the infrastructure to be adapted to the visited areas (educational trails, towers, stands, etc.).

Summarising the data of the study, it can be observed that the provision of outdoor recreation services in the analyzed area could have a high potential for use if the use was stimulated by infrastructural means and combined with other CES. A quarter of tourists (25%) would and would like to go on recreational hikes in the natural environment, 45% would prefer to just relax, i.e., take a picnic or walk in the natural environment.

Potential CES future directions. The study found that entertainment and catering services are so far concentrated only in Rusnė, Dreverna, and Kintai, near the roads that can reach tourist areas, etc. In the areas, such as Saugai, Usėnai, and Juknaičiai, there are practically no centers of attraction, although the population is quite big and the unemployment rates (11.5%) are clearly higher than in the whole country. Locals prefer unemployment benefits instead. According to the representatives of business and elderships, the flows of tourists for the development of catering and accommodation services are too small and only seasonal; therefore, a variety of accommodation and catering services in the mentioned areas is small, whereas specialized services (by type of tourism) are minimal.

It can be noticed that agriculture in Lithuania has always been and will be the main economic activity of rural areas. People engaged in agriculture not only make a profit but also develop multifunctional agriculture, whose activities are not only focused on the production of raw food materials and fiber but may also have an impact on the employment, the landscape, the environment, biodiversity, and the preservation of traditions and heritage, ensuring the quality of food products, creating such services in the countryside that would become an attractive part of recreation for the residents of Lithuania and foreign visitors. These activities can support the vitality of rural areas by enabling farm owners to manage changes in the countryside. The research has revealed that rural tourism is not developed in Saugai, Usėnai, and Juknaičiai, and farming is prioritized in these areas. Therefore, it was asked whether tourists would agree to live on a farmer’s farm, not as in a rural tourism homestead. Twenty percent would like to live as observers (observing what farm work and how the farmer is doing), and 41% would like to test their skills in temporary farming. In conclusion, 61% of respondents would like to try the service; however, such a service is not currently provided. It can be observed that farmers’ farms could provide specialized services by offering agritourism products such as cow milking, berry picking, weeding, and other rural works. Therefore, for farmers living in researched areas, it is worth considering that they could have financial income from both the farm and natural resources (milk, butter, cheese, mushrooms, berries, fish sales, and outdoor entertainment, etc.). It should be noted that the provision of CES (such as nature and ecological tourism, nature observation, etc.) could contribute to the improvement of the socio-economic climate in the region. Tourist packages could also be identified as rural development opportunities, by cooperating with the services of individual adjacent homesteads or other objects/entities, for example, one homestead provides accommodation services, another—catering, the third would be responsible for the leisure time of the tourist on vacation, etc. Unfortunately, tourist packages are not composed in the study area to increase the number of visitors.

After evaluating empirical research (questionnaire) results, Table 2 describes the predicted vectors for the use of selected potential CES and possible change.

**Table 2.** Forecasted vectors of the use of selected potential CES and of possible change.

Examples of Types of Supply Services	Vector of the Change in the Intensity of Use (2020–2030) <sup>1</sup>			
	Opinion of Farmers	Opinion of Entrepreneurs	Opinion of the Eldership Employees	Opinion of Tourist
Cultural heritage	↑	↑	↑↑	↑↑
Aesthetic significance	↑	↑	↑↑	↑↑
Provision of material for research and cognition	↑	↑	↑↑	↑
Aspiration to preserve existing natural values	↑	↑	↑↑	↑↑
Provision of nature and ecological tourism, cognitive excursions, wildlife, observation, cognition service	↑↑	↑↑	↑↑	↑↑
Provision of recreation and nature recreation	↑↑	↑↑	↑↑	↑↑
Provision of recreational fishing opportunities	↑	↑	↑	↑
Religious significance	↔	↑	↑	↑

<sup>1</sup> ↑↑—significant increase in the use of CES; ↑—increase in the use of CES; ↔—changes in the intensity of use of CES without a clear trend.

It should be pointed out, discussing the forecasted vectors, based on opinions of the eldership employees, the strongest future intensity is seen almost on all suggested types of supply services (except only the provision of recreational fishing opportunities and religious significance). Based on opinions of tourists, the strongest future intensity is found on five suggested types of supply services (except the provision of recreational fishing opportunities and religious significance, provision of material for research and cognition, and religious significance). Based on opinions of farmers and entrepreneurs, the strongest future intensity is seen only in two suggested types of supply services (provision of nature and ecological tourism, cognitive excursions, wildlife, observation, cognition service, and provision of recreation and nature recreation).

The studied forecasting of the Lithuanian CES began only a few years ago. So far, it is of a general overview in nature, extrapolating to the general trends taking place in the European Union. There is little systematic data at a national level, so this study would contribute to better decision-making in identifying which CES are missing and which CES provision is deteriorating. Improving the provision of these services would allow Lithuania to avoid economic losses in the future by planning various sustainable activities and seeking nature preservation. Furthermore, this research results in insights that would contribute to future CES development.

## 5. Discussion and Recommendations

It should be emphasized that the development of rural areas in different areas, due to different ecosystem structures, is often unequal. Differences are formed due to different natural and cultural resources, different infrastructural provision and services, different development of local socio-economic infrastructure. Therefore, in order to increase the tourist attraction, it is important to develop specific products by exploiting the advantages provided by local cultural resources, local socio-economic infrastructure, tourism infrastructure provision, and service development. These factors determine the need for new tourist products (creation of individual routes, trips to hard-to-reach regions, extreme trips) and the emergence of products (demand for culinary, historical, folklore, literary, etc. routes). New tourist routes should emphasize their authenticity and educational aspect, look for unused spaces for tourism, attracting local craftsmen, farmers and entrepreneurs, offering original products and services in line with local traditions [61,62]. The tourist of the 21st century is characterized by greater individualism, a desire to spend his or her free time in a different way, and to discover the pleasures provided by an authentic environment. It is noticeable that the “three S” (sun, sand, sea) alone is not enough for a modern tourist, he or she is looking for new challenges and new regions. This is called the search for the “three Es” (entertainment, excitement, education) [38]. It can be observed that, unlike other ecosystem functions such as regulation or supply, the impact of CES is usually intangible, difficult to measure, and quantify. As a result, CES is also treated differently by different people or by different organizations representing different sectors of activity, the so-called stakeholders, both natural and legal persons. For example, an environmentalist knows that it is important to preserve ecosystems, while the average person wants to make the most of the good that ecosystems provide. Therefore, the mass involvement of stakeholders, their participation, and the representation of different perspectives are very important in the process of assessing and preserving the potential of CES.

In different areas, the development of rural areas due to different ecosystem structures usually takes place differently. Differences are formed due to different natural and cultural resources, different infrastructural provision and services, different development of local socio-economic infrastructure. Therefore, in order to increase the tourist attraction, it is important to develop specific products using the advantages provided by local cultural resources, local socio-economic infrastructure, tourism infrastructure provision, and service development. The provision of CES (such as nature and eco-tourism, nature observation, etc.) could contribute to improving the socio-economic climate in the region. Tourist packages could also be identified as rural development opportunities, by cooperating

with the services of individual adjacent homesteads or other objects/entities, for example, one homestead provides accommodation services, another—catering, the third would be responsible for the leisure time of the tourist on vacation, etc. Unfortunately, tourist packages are not composed in the study area to increase the number of visitors.

It should be noted that not all people who leave the agricultural activity will set up rural tourism homesteads, so there is a need for certain action programs that would bring additional income to the population in a particular area, combining the existing infrastructure, cultural heritage, experience, history, etc. As one of the alternatives, it would be possible to recommend a cultural and cognitive path enabling and empowering local cooperation. A cultural path could connect these areas with a specific theme, which means that a story on the chosen theme could be told throughout the journey. The theme should be selected and developed by multi-sectoral expert groups from different localities, revealing the area's history and heritage in the field of cultural tourism and sustainable cultural development. Its specificity would be determined by the geographical, cultural, historical and natural environment features of the areas, the interrelated elements of tangible and intangible heritage. This should use the information on the living environment, interest groups, local resources, and key characters in the area. The cultural and cognitive route would include not only visits to famous places (of participating elderships) but also cultural services provided by forest, meadows, and river ecosystems (e.g., recreation, knowledge of nature, active or passive sports, observation of plants, birds and animals in their natural environment, admiration of natural beauty, sensory-cognitive education, etc.).

Combining or classifying all the above activities according to the age groups, physical fitness, or preferences of the visitors. The following key activities are recommended:

Active recreation in nature (including cycling in the warm season—cycling paths; water sports—kayaking, canoeing; extreme sports (such as hot air ballooning), horseback riding and hiking (active cognitive hiking, including visiting various cognitive sites, health trails), in winter—active skiing or sledding; organization of orienteering competitions).

Passive recreation in nature—cognitive recreation in nature (including recreation in rural tourism homesteads; visiting various nature objects; amateur fishing; observation of plants, birds, and animals—their calculation, description, identification; landscape observation; nature walks and enjoying spiritual experiences; berry picking, mushroom picking as well as various meditation and educational programs such as sound education—to single out, count the sounds heard in nature and to recognize and describe them; smell and color education—to collect a bouquet of forest or meadow plants and describe the colors and smells; forest tree therapy—choose a forest tree and create your own story about that tree; tasting and educational programs of the traditional culinary heritage of those areas, various nature camps, artists' residences, etc.).

Taking into account that one-day recreational cognitive tours are the most popular in Lithuania, it is proposed to combine these activities, i.e., to combine active recreation in nature with passive recreation in order to obtain the greatest possible physical satisfaction in regaining spiritual balance.

It should be emphasized that the organization of activities should include eldership communities and villagers. It is recommended to use certain incentives (depending on the funding requirements and funding period) for the implementation of these activities, such as support for rural development (support for economic start-ups in the rural areas, agri-environment and climate, organic farming), support for local projects, support for beekeeping, direct payments, projects funded by the Culture Support Fund (such as ethnic culture and cultural heritage, artists' residences, cultural education, balanced cultural development, etc.) and to use the aid in order to activate local tourism.

In order to promote the viability of the activities of elderships, it is necessary to keep in mind the more diverse ways of presenting the information. Information should be disseminated through tourism information centers, in cooperation with tourism information centers in the country and in other foreign countries, tour operators, and other entities. The following digital marketing for information dissemination should be used: Internet,

social networks, digital advertising, and mobile apps. It is necessary to create visually appealing websites with information about the services provided (a detailed description, photos, reviews), prices, maps, and links on how to get there and how to contact the service providers. Information should be provided not only in Lithuanian but also in foreign languages, such as English, German, French, Russian, Polish, etc. The information should be made publicly available to as wide a circle of individuals and organizations as possible. This requires the use of social networks such as F, videos on the Y channel. These social networks would provide direct access to consumers. As positive feedback on the services received and the sensations experienced has a very significant impact on attracting visitors, it is appropriate to broadcast these reviews using social media as widely as possible.

In summary, it should be noted that the potential of CES depends and will depend on different ecosystems and their condition. It is clear that the deterioration or even disappearance of those ecosystems will reduce their ability to provide these services. Even when it seems that something is gained with environmental degradation, it is important to keep in mind that even more will be lost. According to Chan et al. [63], the collective effort would help scholars and decision-makers incorporate relational values in their work and better understand how we can collectively and individually move towards more just and sustainable relationships involving nature. Only by understanding and assessing the real potential of the services provided by ecosystems will it be possible to make appropriate, environmentally friendly decisions.

## 6. Conclusions

The range, intensity, and selection priorities of CES used are among the most important parameters for the use of services. The mentioned parameters demonstrate the territorial distribution of services, supply (potential), current volume, quality, and possible threats to the quality of services and the possibilities of providing services in the future.

Thus, seeking to understand the coherence between human and ecosystems, ensuring the social and economic well-being of present and future generations in the context of CES, the research was carried out on the possibilities of adapting human activities to CES in the specific area, in the coastal-rural area, Nemunas Delta and Curonian Lagoon, Lithuania. The research revealed the past and the current situation of CES potential and showed the possible CES potential future development directions.

For this purpose, the empirical study involved representatives of different (public and private) sectors and stakeholders. In order to evaluate the existing problems and future potential of CES, the research was carried out in local tourism cultural centers and elderships with four group respondents: tourists, farmers, entrepreneurs, eldership employees. Due to the large number of CES services, only eight concrete services were selected for the study, such as: provision of recreation and recreation in nature, cultural heritage, aesthetic significance, religious significance, striving to preserve existing natural values, nature and ecological tourism, sightseeing tours, nature observation, cognition service, providing recreational fishing opportunities, providing material for research and cognition. These services were selected on the basis of the existing and potential natural, traditional, and heritage resources of the area, seeking to preserve and enhance them, making them accessible and attractive for visitors.

The research showed that, based on the opinion of the eldership employees, the strongest future intensity is seen almost on all suggested types of supply services (except the provision of recreational fishing opportunities and religious significance). The organization of activities could include eldership communities and villagers who provide a range of services (e.g., stories about the village, its history, objects visited or observed (e.g., baker, beekeeper, a naturalist with his or her activities or monitored activities), folklore ensemble with the customs of that region; accompanying visitors or hikers to their chosen object). It is recommended to use certain incentives (depending on the funding requirements and funding period). Creation of a cultural and cognitive path (so far not at the international but at the local level), enabling and empowering (Rusnė, Dreverna

Kintai, Saugai, Usėnai, Juknaičiai elderships) cultural, educational, heritage and tourism cooperation is recommended as one of the program proposals.

Based on the opinion of tourists, the strongest future intensity was found on five suggested types of supply services (except the provision of recreational fishing opportunities, provision of material for research and cognition, and religious significance). The provision of outdoor recreation services in the analyzed area could have a high potential for use if the use was stimulated by infrastructural means, combined with other CES, although today too little attention is paid to the development of nature tourism services (focused on active and cognitive spending). The high interest of tourists learning about wildlife, biodiversity, and natural landscapes demonstrates good potential for more intensive use of these CES in the future, especially if (thanks to the study) the infrastructure of the study area for sustainable nature and eco-tourism, excursions, and wildlife observation is improved.

Based on the opinion of farmers and entrepreneurs, the strongest future intensity is seen only in two suggested types of supply services (provision of nature and ecological tourism, cognitive excursions, wildlife, observation, cognition service, and provision of recreation and nature recreation). Thus, farmers could provide specialized services in their farms by offering agritourism products such as cow milking, berry picking, weeding, and other rural works. Therefore, for farmers living in the researched areas, it is worth considering that they could have financial income from both the farm and natural resources (milk, butter, cheese, mushrooms, berries, fish sales, and outdoor entertainment, etc.). Residents who have retired from intensive agricultural production activities need certain action programs that would bring additional income by combining the existing infrastructure, cultural heritage, experiences, history, etc.

Hence, to conclude this article, Kieslich and Salles [64]’s ideas come in useful: according to them, further research is expected to contribute to the identification of opportunities to enhance dialogue and collaboration among scientists, decision-makers, and practitioners, notably through science-policy interfaces.

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Article

# Agritourism and Sustainability: What We Can Learn from a Systematic Literature Review

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**Abstract:** Scholars from different perspectives agree that agritourism can be the right tool to balance the needs of tourists with those of rural communities, offering real opportunities for economic and social development, while mitigating undesirable impacts on the environment. This paper aims to provide a holistic outlook of the different perspectives under which scientific literature deals with the topic of agritourism as a means to support the sustainable development of rural areas. To reach this aim, we performed a systematic review of the scientific literature in order to point out the linkages between agritourism and sustainability. We analyzed papers through a text mining solution based on the Latent Dirichlet Allocation (LDA) technique to point out the main topics around which the scientific literature on agritourism and sustainability has grown. Topics are further categorized in themes by means of an agglomerative hierarchical clustering procedure. Results are further analyzed to highlight the strengths and weaknesses of the current streams of the literature.

**Keywords:** sustainable development; Triple Bottom Line; rural development; rural tourism; agriculture; sustainability matrix

## 1. Introduction

Since the second half of the last century, a series of social, economic, and environmental changes have considerably altered the planetary balances, generating events such as climate change, pollution, and loss of biological diversity [1]. The growing gap between rich and poor countries and the resource crisis in the energy, manufacturing, and agricultural sectors has grown more and more with the years, making essential a new concept of development that “meets the needs of the present without compromising the ability of future generations to meet their own need” [2].

Consequences of continuous economic growth (i.e., high social costs, indiscriminate use of natural resources, generalized pollution, etc.) led to a common understanding that the development pathways are no more sustainable and radical changes are needed [3]. A “*new trajectory for development*” is emerging, highlighting from the one side, the limits, and contradictions of the traditional development paradigm, from the other side, the need to transition to sustainable development strategies able to balance economic growth with cultural and natural resource conservation [4]. Fundamentals of such strategies are the three pillars of sustainability (economic, social, and environmental), which are best known as the Triple Bottom Line (TBL) [5]. Building on the principle of “leaving no one behind”, in September 2015, the General Assembly of the United Nations adopted the 2030 Agenda for

Sustainable Development that includes 17 Sustainable Development Goals (SDGs) emphasizing a holistic approach to achieving sustainable development for all [6].

From the industrial revolution on, rural communities have been facing many challenges such as poor commodity prices, rising input costs, environmental pressures, and globalization. Farmers have been increasingly forced to leave their farms and seek other jobs elsewhere, causing a shift of economic activities and population toward urban areas and exposing the rural ones to economic, social, and environmental decline [7–9].

Rural development can be defined as “an overall improvement in the economic and social well-being of rural residents and the institutional and physical environment in which they live” [10]. Nowadays, the concept of rural development is becoming increasingly complex, going beyond the boundaries of the economic sphere and leading to a growing emphasis on the not overexploiting natural resources and landscape, as well as on the stimulation and valorization of existing tangible (e.g., infrastructure, monuments, typical local foods, etc.) and intangible assets (culture heritage, traditions, history). The importance of involving local communities in common development pathways leveraging on territorial specificities of rural areas (e.g., the heritage of natural resources and landscape and the traditions of typical agriculture) is generally understood [11]. Several authors recognized the fundamental contribution of the agrifood sector to the sustainable development of rural areas, indicating evolutionary paths of differentiation and integration able to produce long-lasting development [12,13]. More recent patterns of the agricultural sector evolution highlight structural changes on both the demand and the supply side. On the demand side, consumers become more and more attentive to aspects linked up to the quality and typicality of production, while the supply side is characterized by new supply chain configurations, based on a closer relationship between producer and consumer and on the disintermediation of wholesalers.

To better exploit such evolution patterns, farmers and other organizations have started organizing themselves in rural networks deploying alternative business models aimed to guarantee competitive advantages, to improve farm revenue streams, to resume taking an active role in the agrifood system, and to develop new consumer market niches [14]. Such models are characterized by a re-connection among producers and consumers with these explicit ethical and political goals: re-vitalization of territory identity and rural community relations to local food and agriculture, linking with sustainable agriculture, economically viable, and socially responsible practices [15]. In fact, consumers are paying more and more attention toward viable practices like the “zero kilometers” approach, where the supply and consumption of food products to consumers occurs in the same location (or nearly) as the production [16]. These networks aim at shortening the physical and social distances between producers and consumers by minimizing the number of intermediaries in the food supply chain, having the potential to positively affect the sustainable development of rural areas along all the three pillars of sustainability (economic, environmental, and social) in agricultural systems [17–19].

In this work, we consider a particular model of agricultural business, namely agritourism, where farms, which deploy tourism activities, represent a touchpoint between a network of rural actors (no-profit organizations, local firms, public administrations) and tourists interested in enjoying the local territory. In fact, rural tourism represents a growing market offering to rural communities’ growth opportunities that arise from the emerging trends in tourism demand, which tend to pay more attention to the values of culture, food, and the countryside. It can bring a valuable contribution to the sustainable development of rural areas. Its contribution can be expressed not only in financial terms, but also in terms of jobs, enhancement and revitalization of community pride, encouragement to the adoption of new working practices, and the injection of new vitality into sometimes-weakened economies [20]. In this sense, agritourism represents an authentic form of rural tourism as it allows tourists to live a real and authentic rural experience on a working farm, participating in agrifood activities (e.g., harvesting, feeding, preserves preparation) being in contact with animals and nature and enjoying the food produced and cooked on the farm [21].

Nowadays scholars from different perspectives agree that agritourism can be the right tool to balance the needs of rural tourists with those of rural communities, offering real opportunities for economic and social development while mitigating undesirable impacts on the environment and other socio-cultural aspects [9,22,23]. This work aims to provide a holistic outlook of the different perspectives under which scientific literature deals with the topic of agritourism as a means to support the sustainable development of rural areas. To reach this aim, we performed a systematic review of the scientific literature in order to point out the linkages between agritourism and sustainability.

## 2. Theoretical Background

### 2.1. The Agritourist Farms

The substantial changes that affected the tourism and the agricultural sectors, as well as the growing competitive pressure, led small farmers to explore the feasibility of complementary economic strategies in the attempt to preserve their business initiatives. Specifically, farmers are continually looking for "new ways" of doing business in order to increase the competitive advantage in the global market, improve their sources of income, expand the activities of farms, "use" agricultural products in new ways and innovative, and develop new customer niches [24]. Agritourism activities are increasingly seen as a diversification strategy for agricultural entrepreneurs and as a form of support for the rural economy [25]. In fact, the EU agricultural policies led to a reorientation from a "productionist" agricultural paradigm toward more complex business models, among which the "agritourism" model stands out [26]. As stated by Sonnino, agritourism should be considered as a sustainable strategy: in its stated objectives, it promotes the conservation of a broadly conceived rural environment through its socioeconomic development [5].

In the scientific literature, the term "agritourism" is understood according to different meanings and often synonymous with the terms "agrotourism", "farm tourism", "farm-based tourism", and "rural tourism". In order to provide a clearer overview, in Table 1 we provide some definitions of "agritourism" adopted in the scientific literature.

**Table 1.** Overview of definitions for agritourism given in the scientific literature.

Definition	Source
"visiting a working agricultural setting—usually a farm or ranch—for leisure, recreation or educational purposes"	[27]
"any activity in which a visitor to the farm or other agricultural setting contemplates the farm landscape or participates in an agricultural process for recreation or leisure purposes"	[28]
"any farm-based business offered for the enjoyment and education of the public, to promote the products of the farm, and thereby generate additional farm income"	[29]
"tourist activities of small-scale, family or co-operative in origin, being developed in rural areas by people employed in agriculture"	[30]
"rural enterprises which incorporate both a working farm environment and a commercial tourism component"	[31]
"activities and services offered to commercial clients in a working farm environment for participation, observation or education"	[32]
"a specific type of rural tourism in which the hosting house must be integrated into an agricultural estate, inhabited by the proprietor, allowing visitors to take part in agricultural or complementary activities on the property"	[33]
"activities of hospitality performed by agricultural entrepreneurs and their family members that must remain connected and complementary to farming activities"	[5]
"tourism products which are directly connected with the agrarian environment, agrarian products or agrarian stays"	[34]

Many authors adopt the term “working farm” where tourism services are provided besides traditional agricultural activities [27,29]. However, agritourism and rural tourism are not properly synonymous since the first represents a subset of the latter activities [35,36]. Both agritourism and rural tourism cannot be defined only in terms of the services provided in a place. The definition must include the availability of resources put in value to satisfy a demand through services. In [5,33], authors emphasize that tourism services provided in a working farm have to be strictly connected and complementary with respect to the activity of the agricultural entrepreneur. The term “connection” means that tourism activities are based on the raw materials and the premises of the farm, while the term “complementary” indicates that the tourism activity cannot exist outside an operating farm, but neither can it prevail in the context of the same over typically agricultural activities. In our intent the term agritourism refers to tourism services provided by agricultural entrepreneurs within their own farm, also allowing visitors to take part, directly or indirectly, in agricultural activities. In particular, agritourism farms may offer services as hospitality, meal provision, farm tour, on-site processing of agricultural goods, pick-your-own activities, and so on [21]. It must be emphasized that the study of agritourism has been dealt with according to different approaches, depending on the scientific discipline of reference. The two perspectives mainly adopted concern tourism and agricultural entrepreneurship, addressing agritourism related issues from an organizational, sociological, and economic point of view [37].

## *2.2. Sustainability Impacts*

Since the concept of sustainability was introduced by the Brundtland Report [2], the pillars of the triple bottom line have been successfully used as a framework to holistically investigate the impact of different entrepreneurial activities across the social, economic, and environmental dimensions [22]. In the scientific literature, there are several frameworks to measure the magnitude of such impact on all the possible dimensions and we can briefly refer to these measures as sustainability impacts. Although the indicators used in those frameworks are strictly dependent on the reference industry [38,39], indicators are generally grouped according to the type of measured performance and the extent of the impact. For what concerns the type of performance, such models extend the concept of the economic bottom line (namely, the profit) of traditional accounting frameworks, adding an ecological and social perspective. Social equity, environmental and economic actors are also known under the 3P concept, “People, Planet, Profit” respectively [40]. The extent of the impact relates to sustainability at a micro or a macro level [41]. While the micro-level pertains to business value aspects related to the single enterprise (farm), the macro-level deals with the generation of value for the whole industrial branch or the region (or country) where the company operates [42].

Multidimensional approaches to sustainability are widely adopted also in agricultural and tourism settings. In the case of agriculture, the combination of traditional subsistence and modern farming practices paves the way to new agricultural models such as agroecology, which foster ecologically, culturally, and socially integrated practices and facilitate resilience through diversity [19,43]. Sustainability and rural tourism are always more intertwined, highlighting the increasing interest of tourists in experiencing the rural environment and being part of the social fabric of the local community [44].

Agritourism is the business activity that best embodies the aspects just presented, as it represents fully the precepts of sustainable agriculture, as well as those related to sustainable tourism. In fact, Agritourism is seen as a “smart chance” for the sustainable development of rural communities, with multiplier effects on some important parts of economic and social life [45]. Previous research found that agritourism farms act as a stimulus for other local activities (e.g., agrifood producers, handicrafts, restaurants, shops) [4,32] as well as contributing to the preservation of customs and the local culture [46]. Tew and Barbieri [28] put in evidence that farm entrepreneurs are motivated in starting agritourism activities because of the increase in farm’s revenue stream, offering the possibility to capture new customers more than traditional farming, and the improvement of the farmer’s quality

of life, promoting a way of life in contact with nature and providing alternative job opportunities with their families. These factors are important in contexts characterized by higher costs of land and input in general, especially for small businesses [3].

Some authors have dealt with the study of the motivations underlying the setting up of agritourism activities, emphasizing the dual role of agritourism for both individual “actors” (rural tourism operators, intermediaries in the tourism sector, and visitors) and the rural community as a whole [31]. However, the scientific literature lacks a systematic overview of the potential benefits of the agritourism industry for the long-lasting development of rural areas. This limitation is essentially due to the complexity of the set of economic and non-economic objectives associated with agritourism activities. We intend to fill this gap using the methodology described in the next section.

### 3. Methodology

In this paper, we carried out a systematic literature review to provide a complete, exhaustive summary of relevant literature addressing the role of agritourism in supporting the sustainable development of rural areas. Following the principles and the process of a Systematic Literature Review proposed by Denyer and Tranfield [47], our research methodology was organized in three phases: papers location and selection, papers analysis and classification, the definition of themes.

#### 3.1. Papers Location and Selection

We selected Scopus as the scientific database to perform our search. Scopus delivers a comprehensive overview of the world’s research output in our domain of reference and it can handle advanced queries. Elsevier Scopus is a citation database containing more than 50 million records from around 5000 publishers, for publications in peer-reviewed journals, omitting books, book chapters, discussion papers, and non-refereed publications.

Based on the prior experience of the review team and previous literature on Agritourism Studies, an initial set of keywords was defined. First, we have considered synonyms of “Agritourism” as search items. We initialized a List A of search keywords with English terms related to agritourism based activities (including “agritourism”, “agrotourism”, “agri-tourism”, “agro-tourism”, “Farm based tourism”, “Farm tourism”, “Rural tourism” [21]). We also initialized a List S of sustainability-related terms (including the terms “sustainability”, “sustainable”, “development”, and related synonymous).

The keywords were constructed into search strings, in order to administer the search to the Scopus scientific database. The following search string was structured: *The search must contain at least one keyword of the Agritourism Domain (A) and one keyword from the Sustainability Domain (S)*. Through this procedure, we identified an initial sample of 212 papers. We manually analyzed metadata (authors, title, source, and year) in order to detect new keywords to add to the lists A and S respectively. We iteratively performed this phase until no newer keywords or new papers were found. Through this procedure, we identified a list of 405 scientific works.

After, the objective of the process was to select papers with high scientific quality. As a consequence, we have kept only those articles in the sample that were published in academic journals, removing conference proceedings as source type. A total amount of 325 entries is indexed as journal papers. In order to assess the quality of scientific publications, we selected only journals with impact factors indexed in the Thompson Reuters Journal Citation Reports. At the end of this cycle, we obtained the final set P of 192 papers (published in 66 journals) to be analyzed. In Figure 1, a graphical representation of sampled papers in P clustered by publication year is shown.

#### 3.2. Papers Analysis and Classification

The set P was analyzed through quantitative techniques with the aim to identify relevant topics in the investigated knowledge domain and to group them in macro themes. In particular, we applied a text mining solution based on the Latent Dirichlet Allocation (LDA) technique [48]. This allowed us to build a Document–Term Matrix, that is, a matrix describing the relative presence of keywords in a

corpus of documents. The LDA technique leverages Bayesian Estimation Techniques to infer a vector representing the degree of membership (topic proportion) of each document to each topic. The LDA technique takes as input the documents to be analyzed (192 papers) and the number of topics  $k$  to be extracted. As suggested by Chang et al. [49] and Blei [48], we selected  $k$  using a reasonable practice of evaluation among alternative values in such a way that the interpretation of the machine-generated model results becomes as easy as possible from the point of view of a human reader. We have evaluated multiple outputs of the LDA with  $k$  ranging from 2 to 30 and have consensually agreed that the most meaningful set of topics is reached with  $k = 10$ .

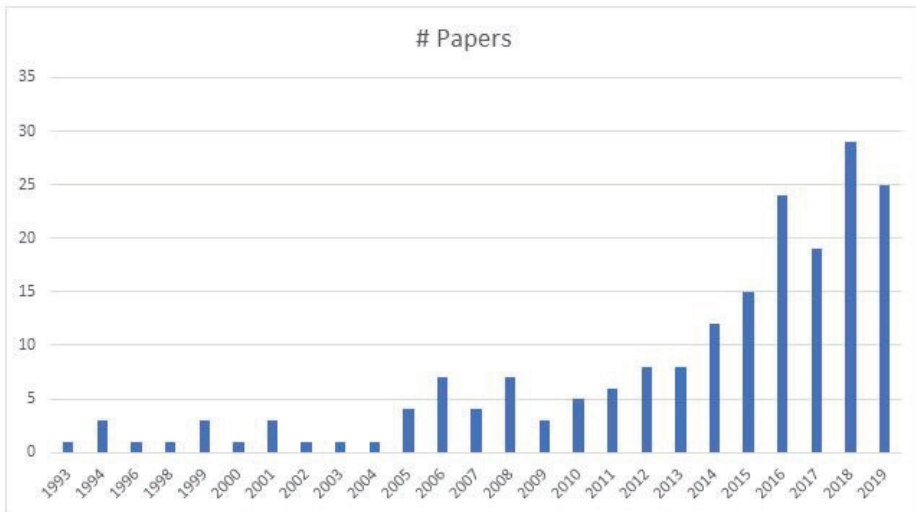


Figure 1. Papers in P by publication year.

The LDA procedure gave as output (Table 2) a group of significant keywords associated with each topic and the document–term matrix.

Table 2. Keywords grouped by topics (LDA output).

Topic 1	“visit”	“festiv”	“collab”	“event”	“particip”
Topic 2	“product”	“livelihood”	“sell”	“food”	“market”
Topic 3	“touris”	“farm”	“cost”	“valu”	“profit”
Topic 4	“invest”	“territor”	“region”	“infrastructur”	“system”
Topic 5	“land”	“natur”	“protect”	“pollut”	“mountain”
Topic 6	“resource”	“responsib”	“waste”	“landown”	“natur”
Topic 7	“heritag”	“touris”	“territor”	“tradition”	“cultur”
Topic 8	“job”	“farmer”	“increas”	“famil”	“resid”
Topic 9	“lifestyle”	“activit”	“educ”	“farm”	“touris”
Topic 10	“women”	“motiv”	“incom”	“household”	“independen”

### 3.3. Definition of Topics

In order to deduce meaningful descriptions of each topic, we implemented a human-based review of a restricted, representative, and relevant subset  $Q \subseteq P$  of high-quality papers.  $Q$  consisted of those articles in  $P$  that match ALL the following criteria [50]:

Were published in academic journals ranked at a “C” level or higher of the German Academic Association for Business Ranking or equivalent values of ISI Impact Factor (IF  $\geq 0.7$ ) or ABS Academic Journal Quality Guide (higher than 2° category).

Have a topic proportion (TP) value of 0.25 or higher.

Papers included in the subset Q are 34 and are listed in Appendix A.

The 10 topics detected with the LDA procedure are named and discussed according to the 34 selected papers.

#### 4. Results

In this section, we provide a state-of-the-art review basing on the description and the analysis of topics emerged as the output of the LDA procedure. We assume that the keywords associated with each topic represent a synthesis of the main points discussed in the literature. In any case, to build a reliable interpretation of each topic, we provide a discussion considering relevant papers to confirm and integrate the interpretations derived from the analysis of the keywords. The 10 topics detected with the LDA procedure, are named and discussed according to the 34 selected papers. In particular, the discussions are developed based on the papers’ main concepts which are the original proposals by the papers’ authors or reformulations of studies they cited.

##### 4.1. Topic 1: Stimulus for Other Local Activities and Boosting Local Economies

Several authors consider agritourism a potential means for economic development and regeneration of rural areas, especially for territories with limited options for development [8]. Agritourism activities act as a stimulus for other local activities (suppliers of touristic service, crafts, shops, museums) and for the promotion of the rural area. Agritourism farms often represent a hub for agritourism rural networks where agrifood products and tourism services meet consumers’ demand for relocalization, acting as a trigger to motivate further direct business opportunities between tourists and other rural community actors [4]. Agritourism represents a contact point between what the rural network offers and the tourist/customer demand. Local suppliers, through their long-term contracts with the farm, offer agritourists their goods and services having indirect contact with them (mediated by the farm) [4]. In fact, tourists hosted in agritourism, usually visit rural areas and purchase agricultural products and village handicrafts. The positive effect of agritourism on the rural area is shared among several economic activities, as tourist spending does not relate only to agritourism services, but also to restaurants, crafts, commerce, and other firms located in the rural region. In this sense, agritourism supports economic development by contributing to the generation of demand for the products produced locally and other related rural goods and services. [51]. Tregua et al. [52] emphasize the relationship between agrifood products and tourism, considering agritourism to be a useful tool in increasing local economic development through mutual enhancement and territorial promotion. Several authors agree that the positive impacts of agritourism extend beyond the farm gates, highlighting that the increased revenues in agritourism farms can boost local economies through increased sales taxes, generation of local employment, and stimulation of local businesses [22,53]. Rural areas can exploit agritourism to activate positive network externalities, encouraging other types of commercial activities or complementary services, thus generating a “virtuous” circle [54,55].

##### 4.2. Topic 2: Alternative Source Income for the Farmer/Business Diversification

Much research has addressed economic motives as important drivers of agritourism development from a service provider perspective [27,56]. Such studies are mainly based on survey research investigating benefits deriving from agritourism activities for farmers in specific rural contexts, for example, Montana [57], Virginia [30], Australia [31], Northeastern England [58], and Missouri [59].

It has been observed that agritourism offers many opportunities to small and medium farms. The opportunities include increased farm gross income, the generation of cash flow, and a chance for



economic diversification, expanding marketing and farm brand awareness, and smoothing seasonal fluctuations in farm revenue that are customary among many forms of agriculture [53,60].

Although it is not always able to generate high profits, in many cases, agritourism generates enough revenue to enable farms to survive during periods of poor production [7,55]. Veeck et al. [61] found that the majority of agritourism operations serve as supplemental sources of income while agricultural production remains the primary focus. Farmers are looking for “new ways” of doing business, exploring the viability of alternative economic strategies [62]. Agritourism, as a form of on-farm entrepreneurial diversification, has been frequently promoted to face this challenging agricultural context. Diversification strategies have been suggested to create a more stable, and often higher, income for the producer or to supplement farm incomes in times of economic distress such as a poor harvest or depressed prices [63].

#### *4.3. Topic 3: Distribution Channel for Farm Product/Developing New Tourism Market Niches*

Agritourism represents an important opportunity in particular for small and medium farms, usually unable to compete with big farms on large-scale production and to face the bargaining power of mass retail channels [64]. Agritourism may represent an alternative distribution channel for farm production, creating cross-marketing opportunities for farm household products [65].

#### *4.4. Topic 4: Infrastructural Investments*

The diversification of economic activities increases the value of properties in a territory, creating a ready infrastructure and opportunities for the economic development of other activities in a rural area [66]. The direct boost of agritourism-based activities not only generates multiplying effects in the local economic system as a whole but generates indirect positive effects in the entire local economic structure in terms of public investments and attraction of capital from outside the rural area [67], stimulating the development of physical infrastructure and strengthening the local structure.

#### *4.5. Topic 5: Natural and Landscape Resources Maintenance/Biodiversity and Environmental Protection*

The role of agricultural activities in contributing to the creation and modification of rural landscapes is widely recognized [68]. Over the centuries, agriculture has configured the current European landscape as a unique semi-natural environment, often endowed with a wide variety of habitats and species, whose livelihood depends on the continuation of agricultural activity.

The landscape is certainly a very important element in territorial competition and agritourism has excellent growth potential in rural areas characterized by the high quality of the landscape.

The need to address the tourist demand for a greater variety of products that agritourism farms are able to directly sell results in a minor presence of monoculture production, generating a different mosaic of landscapes.

According to Mastronardi et al. [69], the presence of agritourism farms in farming systems falling in forests and protected areas has positive impacts on biodiversity and natural resources since they develop more sustainable practices. Several works found that agritourism plays a relevant role in soil protection and in hydrogeological disaster prevention [70,71]. Hence, agritourism represents a form of sustainable tourism able to conserve and develop rural landscapes and biodiversity.

#### *4.6. Topic 6: Responsible Use of Raw Materials and Natural Resources/Waste Reduction*

Few studies emphasize the role of agritourism as a means to promote the responsible use of natural resources. According to Giurea et al [72], agritourism is a link to redesign the terms of consumption and waste for non-renewable energy sources. Re-using, recovering, re-developing, regenerating, and valorizing resources, must be considered as a frame of reference for sustainability in agritourism. Carlsen et al. [73] and Choo and Jamal [74] found a very strong inclination of farmers

toward environmentally friendly practice adoption, including water conservation procedures, recycling programs for materials, and guest's education on conservation matters.

Many agritourism entrepreneurs are developing greater sensitivity in the exploitation of natural resources to produce energy with zero environmental impact [75]. Moreover, agritourism represents an opportunity to reduce food waste and reuse unsold products. Composting at the farm is usually done with some leafy leftovers from the garden, and the food leftovers can be safely used to feed animals. Agricultural products unsold through traditional channels can be used in restaurant services or to produce marketable foodstuffs (e.g., fruits turned into jam, vegetables preserved in oil) [76].

#### *4.7. Topic 7: Recovery of Roots, Folklore, and Traditions*

Agritourism represents a fundamental element in safeguarding the cultural heritage of rural areas [67]. It is mostly agreed that agritourism represents a key factor for local development, for rural marginal areas where the environmental and cultural heritage are strongly appreciated by tourists [77,78]. Agritourism was regarded as a form of rural tourism, which is rooted in rural areas with rurality as the dominant attraction. Agricultural landscape, rural vernacular landscape, and cultural heritage can be presented as an open-air museum displaying culture on the land by local people. Agritourism engages elements of community participation, heritage resource management, and strength rural tourism development plans [79].

#### *4.8. Topic 8: Provide Alternative Job Opportunities to Family Members*

Agritourism represents an important job opportunity, especially for young farmers [64]. In fact, several authors suggest that agritourism represents a means to provide employment for family members and an opportunity to plan farm succession, in order to preserve the business for future generations [53]. Transgenerational continuity of the family farm is imperative for agribusiness activity [80]. According to Brandth and Haugen [81], agritourism represents a great opportunity to maintain and renew the farm and its assets. Authors found that taking care of the farm resources and improving them for successors is a typical characteristic of farmer mentality: farm owners continue to take care of and build on local traditions and continuity, albeit for commercial reasons.

#### *4.9. Topic 9. Educate Visitors on Agriculture and the Rural World*

Agritourism offers visitors the opportunity to enjoy and reinforce the atmosphere of the agricultural life by staying at a real working farm, while the farmers can promote the conservation of the rural context [5]. Pastoral life, rural lifestyle, and eno-gastronomy are some aspects encouraging tourists to visit rural farms with the purpose of education, recreation, and active involvement in farm-based activities [82,83]. This form of tourism experience is particularly appropriate for tourists who seek traditional rural hospitality and access to nature, outdoor activities, and cultural experiences while helping farmers to maintain agricultural viability and to diversify rural economies [8].

#### *4.10. Topic 10. Enabler of Emancipation of Women*

Some authors recognize the role of agritourism as an element for independence and empowerment for women in rural communities, from a psychological, social, political, and economic point of view [84]. Agritourism contributes to rebalancing the gender dynamics determined by the participation of women in agricultural settings. Several studies emphasize that agritourism initiatives are often carried out by women [85]. Agritourism creates the need for an additional workforce, creating employment opportunities for women outside their households [30].

According to Brandth and Haugen [81], "engaging in farm tourism implies a change that not only demands new skills and competencies but may also influence the conditions under which gender relationships, power, and identities are enacted". The opportunity to manage a business and the assumption of a leadership role, allows women to go beyond the purely operational tasks carried out in the agricultural sector. This gives women a voice and decision-making power, even if limited

by the scope of agritourism activities. According to Annes and Wright [86], agritourism allows women to develop self-confidence and challenge dominant representations portraying farm women as “incomplete farmers”. In fact, agritourism gives them the opportunity to craft a professional image by demonstrating specialized knowledge and authority to the public.

## 5. Discussion

In the previous section, we showed how the methodology used in this research was able to detect the 10 topics around which clusters the scientific literature of agritourism and sustainable development. In this section, we show that further groupings are possible that give other interesting significance to the proposed topics.

### 5.1. The Three Themes

The 10 topics were further grouped into  $t$  themes by means of an agglomerative hierarchical clustering procedure. The degree of relationships among topics was calculated considering the Pearson Correlation Coefficient across the topic proportion for all paper, deriving from the Document Term Matrix obtained as the output of the LDA procedure.

Let  $p_{ij}$  (with  $i, j \in 1, k$ ) the Pearson Correlation Coefficient across the topic  $i$  and  $j$ , and  $D^{k \times k}$  a Dissimilarity Matrix where each element  $D(i,j) = 1 - p_{ij}$ . We performed a hierarchical clustering procedure to obtain  $t = 3$  groups of topics. We decided to cut the dendrogram where the gap between two successive combination similarities is the largest [87].

The evaluation of results coming from the LDA procedure, based on a subjective analysis of the authors, led to the identification of the three main themes in the analyzed literature and their relationship with the topics. We can state that the three themes, analytically calculated after an agglomerative hierarchical clustering procedure, can overlap the three dimensions of sustainability as reported in Barbieri [22]. According to the aim of this study, we describe the themes as follows.

#### 5.1.1. Theme 1: Economic Perspective

This theme includes all papers that look at agritourism as a means to stimulate other local activities and to contribute to the economic growth of the rural community. Indirect positive effects can be generated for the entire local economic structure in terms of attraction of investments for common infrastructure. Agritourism activities are mainly established to favor business diversification, creating an alternative source of income to the farm. Agritourism activities represent an effective distribution channel for farm products and, if well managed, a way to develop new market niches. As a result of the subjective analysis, the authors retrieved that 107 papers in  $P$  addressed an economic perspective (even if not always exclusively).

#### 5.1.2. Theme 2: Environmental Perspective

To this theme belong all papers dealing with the ability of agritourism to contribute to preserving the original landscape and maintaining natural resources in order to protect the rural environment and its biodiversity. In this sense, all papers that report about the responsible use of raw materials and natural resources, as well as waste reduction, belong to this theme. In total, 46 papers in  $P$  addressed an environmental perspective (even if not always exclusively).

#### 5.1.3. Theme 3: Social Perspective

From the one side, all papers that inform readers about the rural traditions belong to this theme (e.g., dealing with the recovery of roots, folklore, and local traditions). From the other side, papers that aim to “educate” readers to avail fruition from the rural world belong to the theme as well. Furthermore, papers which highlight benefits of agritourism as a means to providing alternative job opportunities to family members also belong to this theme as well as papers highlighting the role of agritourism

activities in increasing women emancipation. Also, in this case, the subjective analysis found that 96 papers in P addressed a social perspective (even if not always exclusively).

### 5.2. The Agritourism Sustainability Matrix

As already stated, the LDA procedure lets us identify a grouping of the 10 topics in three themes that can be easily overlapped with the three dimensions of sustainability.

According to [42], another grouping can be proposed here for papers in P considering the level of analysis (focus and aims) of each study. After a subjective analysis by the authors, each paper was classified as “micro-level paper”, when the research focus was a single agritourism farm, or as “macro-level paper”, which studied the effects of sustainability on a region or the industry. This clustering led the authors to identify 53 papers in P that can be clustered as primarily micro-level studies, 91 papers as macro-level analyses while 48 examined both levels.

In the end, it is possible to relate the two clusterings of topics introduced in this section in the matrix showed in Table 3 that we name “the agritourism sustainability matrix”.

**Table 3.** The agritourism sustainability matrix.

	Economic Perspective	Environmental Perspective	Social Perspective
<b>Macro Level</b>	Topic 1: <i>Stimulus for other local activities and Boosting local economies</i> Topic 4: <i>Infrastructural investments</i>	Topic 5: <i>Natural and landscape resources maintenance/Biodiversity and environmental protection</i>	Topic 7: <i>Recovery of roots, folklore, and traditions.</i> Topic 9: <i>Educate visitors toward agriculture and the rural world</i>
<b>Micro Level</b>	Topic 2: <i>Alternative source income for the farmer/Business diversification</i> Topic 3: <i>Distribution channel for farm product/Developing new markets niches</i>	Topic 6: <i>Responsible use of raw materials and natural resources/Waste reduction</i>	Topic 8: <i>Provide alternative job opportunities to family members</i> Topic 10: <i>Enabler of emancipation of women</i>

In Table 4, for each matrix dial, the number of papers in P which primarily dealt with that level of analysis and type of perspective is reported.

What we can learn from the results reported above can be summarized as follows:

The importance of setting up agritourism activities to reach sustainable development for rural areas is always more understood by scholars who authored both theoretical studies and empirical research on this topic. As shown in Figure 1, the number of papers dealing with agritourism and sustainability is constantly growing with the years, highlighting an increasing interest from the scientific community.

As reported in Table 3, studied topics cover all the three dimensions of sustainable development, according to the 3P concept in [40], at different extents of the impact [42]. It is worth noting that while the economic and social perspectives are dealt with in four topics each, only two research topics present an environmental perspective.

What emerges from Table 4 is that scholars adopted mainly mono perspectives in their works with more than 60% of papers adopting a purely economic or social perspective. Multidisciplinary approaches are much less diffused and generally are studies combining the social perspective with the economic ones as showed in Tew and Barbieri [28,45].

Although surveyed papers covered both the two levels of analysis, macro and micro, an in-depth look at Table 4 highlights that scholars were more interested in studying sustainability impacts at a macro-level. Comprehensive studies that analyze the effects of agritourism activities at both the two analysis levels are present as well, thus confirming the interest already shown in [31] to analyze the dual role of agritourism for both individual actors and rural community as a whole.

Overall, two main gaps emerge in the scientific literature to be filled in order to delineate a holistic view of agritourism and sustainable development:

The environmental dimension, which is the less covered by literature, both in mono and multi-perspective studies, should be addressed much more by scholars.

Few studies are present which have a comprehensive and multidisciplinary view capable of evaluating the impact of agritourism activities on all the dimensions of sustainable development for rural areas.

**Table 4.** Paper classification.

	Economic Perspective	Environmental Perspective	Social Perspective	Economic and Social Perspective	Economic and Environmental Perspective	Environmental and Social Perspective	Economic, Environmental and Social Perspective	TOT
Macro Level	27	14	25	19	3	2	1	91
Micro Level	23	9	18	2	1	0	0	53
Macro & Micro Level	14	3	12	6	2	2	9	48
TOT	64	26	55	27	6	4	10	192

## 6. Conclusions

In this paper, we provided a holistic outlook of the different perspectives under which scholars deal with the joint topics of agritourism and sustainability.

We performed a systematic literature review to reach a systematization, in topics and themes, of the scientific literature dealing with agritourism as a means to support the sustainable development of rural areas. Moreover, we provided a deeper analysis of the results of the literature review, highlighting the strengths and weaknesses of the current streams of the literature with respect to the definition of a comprehensive body of knowledge really able to depict a big picture of agritourism as a sustainable rural development strategy.

Our research highlights that the scientific literature has a very positive vision of agritourism. This vision is in line with the goals of the UN's 2030 Agenda for Sustainable Development [6]. Agritourism could lead to the reduction of poverty through tourism, generating employment opportunities, creating synergies with agriculture and local service provider sectors, achieving gender equality, and stimulating the development of basic infrastructures such as roads, ports, and airport facilities.

We found that scholars emphasize the importance of setting agritourism activities, both for farms and for the rural community, to revitalize the rural communities through a sustainable development strategy. According to a recent report provided by Fortune Business Insights [88], the global agritourism market is anticipated to exhibit astonishing growth soon. Starting from a market size of USD 69.24 billion, the report forecasts it reaching USD 117.37 billion by 2027, exhibiting a CAGR of 7.42% during the forecast period. Nevertheless, agritourism still represents a niche market if compared to the whole tourism industry. Evidence from empirical studies suggests some limitations and barriers to agritourism development, including fragmentation of tourism promotion efforts among involved farmers and destination management organizations [89], lack of entrepreneurial farsightedness among farmers [90], and the lack of financial resources [91]. The analysis of motivations limiting the exploitation of agritourism in supporting rural development goes beyond the scope of this research. We aimed to provide an outlook on how the scientific literature dealt with the topic of agritourism to support the sustainable development of rural areas. In any case, the potential benefits of agritourism activities in rural settings and barriers to agritourism development deserve to be holistically deepened and generalized.

Some limitations affect this research. Methodological choices made in the paper, including the selection criteria of the papers for detailed analysis, dealt with relevant sources in previous literature. However, these restrictions could lead to the exclusion of interesting works. Despite the Scopus database being probably the world's largest one, this study is limited to the scientific papers available

in this single one. Moreover, inclusion criteria adopted for the human-based review of representative and relevant papers limited the number of selected papers by excluding some interesting articles. However, although these works were excluded from the human-based analysis, these were nevertheless considered in the LDA procedure.

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## Appendix A

**Table A1.** List of the top-ranked papers for each topic.

#	Authors	Year	Title	Source	Topic
1	Yang, L.	2012	Impacts and challenges in agritourism development in Yunnan, China	Tourism Planning and Development	1
2	Tregua, M., D’Auria, A., and Marano-Marcolini, C.	2018	Oleotourism: Local Actors for Local Tourism Development	Sustainability	1
3	Barbieri, C., and Mahoney, E.	2009	Why is diversification an attractive farm adjustment strategy? Insights from Texas farmers and ranchers	Journal of rural studies	1
4	Barbieri C.	2013	Assessing the sustainability of agritourism in the US: A comparison between agritourism and other farm entrepreneurial ventures	Journal of Sustainable Tourism	1
5	Broccardo, L., Culasso, F., and Truant, E.	2017	Unlocking value creation using an agritourism business model	Sustainability	1
6	Tew, C., and Barbieri, C.	2012	The perceived benefits of agritourism: The provider’s perspective	Tourism Management	2
7	Phelan, C., and Sharpley, R.	2011	Exploring agritourism entrepreneurship in the UK	Tourism Planning and Development	2
8	Kim, S., Lee, S.K., Lee, D., Jeong, J., and Moon, J.	2019	The effect of agritourism experience on consumers’ future food purchase patterns	Tourism Management	2
9	Lupi, C., Giaccio, V., Mastronardi, L., Giannelli, A., and Scardera, A.	2017	Exploring the features of agritourism and its contribution to rural development in Italy	Land Use Policy	3
10	Valdivia, C., and Barbieri, C.	2014	Agritourism as a sustainable adaptation strategy to climate change in the Andean Altiplano	Tourism Management Perspectives	3
11	Contini, C., Scarpellini, P., and Validori, R.	2009	Agri-tourism and rural development: The Low-Valdelsa case, Italy	Tourism Review	4
12	Melendez-Pastor I., Hernández E.I., Navarro-Pedreño J., Gómez I.	2014	Socioeconomic factors influencing land cover changes in rural areas: The case of the Sierra de Albarracín (Spain)	Applied Geography	4
13	Briedenhann J.	2007	The role of the public sector in rural tourism: Respondents’ views	Current Issues in Tourism	4
14	Sgroi, F., Di Trapani, A.M., Testa, R., and Tudisca, S.	2014	The rural tourism as development opportunity or farms. The case of direct sales in Sicily	American Journal of Agricultural and Biological Sciences	5
15	Mastronardi, L., Giaccio, V., Giannelli, A., and Scardera, A.	2015	Is agritourism eco-friendly? A comparison between agritourisms and other farms in Italy using farm accountancy data network dataset.	SpringerPlus	5

Table A1. Cont.

#	Authors	Year	Title	Source	Topic
16	Alves-Pinto H.N., Latawiec A.E., Strassburg B.B.N., Barros F.S.M., Sansevero J.B.B., Iribarem A., Crouzeilles R., Lemgruber L., Rangel M.C., Silva A.C.P.	2017	Reconciling rural development and ecological restoration: Strategies and policy recommendations for the Brazilian Atlantic Forest	Land Use Policy	5
17	Kupidura A., Luczewski M., Home R., Kupidura P.	2014	Public perceptions of rural landscapes in land consolidation procedures in Poland	Land Use Policy	5
18	Sayadi S., González-Roa M.C., Calatrava-Requena J.	2009	Public preferences for landscape features: The case of agricultural landscape in mountainous Mediterranean areas	Land Use Policy	5
19	Carlsen, J., Getz, D., and Ali-Knight, J.	2001	The environmental attitudes and practices of family businesses in the rural tourism and hospitality sectors	Journal of sustainable tourism	6
20	Choo, H., and Jamal, T.	2009	Tourism on organic farms in South Korea: a new form of ecotourism	Journal of sustainable tourism	6
21	Bonadonna, A., Matozzo, A., Giachino, C., and Peira, G.	2019	Farmer behavior and perception regarding food waste and unsold food	British Food Journal	6
22	Ciolac, R., Iancu, T., Brad, I., Popescu, G., Marin, D., and Adamov, T.	2020	Agritourism Activity—A “Smart Chance” for Mountain Rural Environment’s Sustainability	Sustainability (Switzerland)	7
23	Songkhla, T.N., and Somboonsuke, B.	2013	Interactions between agro-tourism and local agricultural resources management: A case study of agro-tourism destinations in Chang klang District	<i>Journal of Agriculture and Food Sciences</i> , 1(3), 54–67	7
24	LaPan C., Barbieri C.	2014	The role of agritourism in heritage preservation	Current Issues in Tourism	7
25	Muresan I.C., Oroian C.F., Harun R., Arion F.H., Porutiu A., Chiciudean G.O., Todea A., Lile R.	2016	Local residents’ attitude toward sustainable rural tourism development	Sustainability (Switzerland)	8
26	Garau C.	2015	Perspectives on cultural and sustainable rural tourism in a smart region: The case study of Marmilla in Sardinia (Italy)	Sustainability (Switzerland)	8
27	Park D.-B., Nunkoo R., Yoon Y.-S.	2015	Rural residents’ attitudes to tourism and the moderating effects of social capital	Tourism Geographies	8
28	Suess-Reyes, J., and Fuetsch, E.	2016	The future of family farming: A literature review on innovative, sustainable and succession-oriented strategies	Journal of rural studies	9
29	Idziak W., Majewski J., Zmyslony P.	2015	Community participation in sustainable rural tourism experience creation: a long-term appraisal and lessons from a thematic villages project in Poland	Journal of Sustainable Tourism	9
30	Sonnino, R.	2004	For a ‘piece of bread’? Interpreting sustainable development through agritourism in Southern Tuscany	Sociologia Ruralis	9
31	Yang, L.	2012	Impacts and challenges in agritourism development in Yunnan, China	Tourism Planning and Development	9
32	McGehee, N., Kim, K., and Jennings, G.R.	2007	Gender and motivation for agri-tourism entrepreneurship	Tourism Management	10
33	Brandth, B., and Haugen, M.S.	2011	Farm diversification into tourism—implications for social identity	Journal of rural studies	10
34	Gil Arroyo, C., Barbieri, C., Sotomayor, S., and Knollenberg, W.	2019	Cultivating Women’s Empowerment through Agritourism: Evidence from Andean Communities	Sustainability (Switzerland)	10

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Article

# Heritage, Tourism and Local Development in Peripheral Rural Spaces: Mértola (Baixo Alentejo, Portugal)

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**Abstract:** In the context of multiple repurposing of rural spaces, tourism represents a path for development, with the potential to revitalize these areas. The conservation and restoration of heritage, and its promotion through tourism, can become an opportunity for local development, in which a range of stakeholders fulfil different roles in the carrying out of the processes involved. The aim of the study was to analyse the heritagisation processes and their tourist value enhancement and how it affects local development in Mértola (Baixo Alentejo, Portugal). A series of interviews with the chief stakeholders in the process were conducted, from which the contexts and conceptualisations of development were determined. On the basis of secondary data in terms of statistics, an analysis of the impacts of the process of heritagisation and the development of tourism was undertaken. The main conclusions drawn by the research are the following: (a) the importance of the process of heritagisation in Mértola; (b) the viability of the project, given the cost and lack of comprehensive conservation, in creating a unified whole; (c) the performance of, and power relationships between, the various stakeholders; (d) the limited participation of locals due to disaffection with the project; (e) the correlation between heritage, rural tourism, and local development.

**Keywords:** peripheral areas; local development; heritagisation; sustainable rural tourism; stakeholders; disaffected citizens

## 1. Introduction

Rural areas have often experienced a deepening crisis as a result of the effects of globalisation, economic cycles, new production practices, and sociological and cultural changes, all of which have forced local development to adopt multifunctional approaches [1,2] and economic diversification [3]. These processes have been comparably common in “lagging rural regions” [4] (p. 347), which characteristically lack the critical mass to be able to compete and suffer from the decline of traditional activities [4] and a marked peripheralisation [5]. Consequently, growth within these communities is highly dependent on their capacity for adaptive [2] and innovative [6] strategies, which can allow its development, overcoming the centre–periphery models [4].

By these means, rural areas can become “locations for the stimulation of new socio-economic activity” [4] (p. 347) through diversification [1,4]: leisure, rural tourism, catering establishments, biodiversity conservation, housing expansion, and utilization of the natural and cultural heritage.

Also, the reinterpretation of other traditional uses of heritage such as agriculture, agribusiness, crafts, and quality products, among others, is possible [4,7].

Two perspectives of the rural landscape and its resources have emerged [8]: (a) the external view: as a recreational space which needs to be regulated if it is to be preserved and enjoyed; (b) the internal view: as a habitable space, the legislation concerning which acts as a barrier to the everyday activities and practices of the population. Residents tend to take a utilitarian and pragmatic perspective view of rural spaces based on production, often at odds with environmental regulation of its natural resources, while visitors and tourists tend towards a more aesthetic or consumer-centred perspective, which favours legislating its uses [9]. In this regard, the EU policies have articulated guidelines for the diversification and improvement of agricultural production, the prevention of rural depopulation, and the generation of employment and income. Rural communities have thus seen their social and cultural capital become their main heritage asset [10,11].

Rural areas on the periphery base their strategies for development on traditional activities [4]. In such a context, tourism becomes a challenge [12] and takes on a dual role as: (a) an agent of diversification and regeneration of the traditional way of life [13]; and (b) a means of strengthening the processes of local development [14]. Control over these processes on the part of local residents enables them to ensure that this development is both sustainable and beneficial [15]. Nevertheless, it is possible for tourism to be overvalued as a panacea for the decline in rural conditions [12,16], as the political and popular discourses testify, and for an area's limitations in terms of development to be pushed to the background [17], while its resources and potential are foregrounded [18]. The fact that not all locations are equally open to the development of tourism, enjoy the same degree of popularity, or have the same advantages is often forgotten, thus fuelling the contrary viewpoint that regards transformation in the name of tourism as a commodification of the rural environment [19].

To this can be added an additional layer of complexity with regards to studies into rural tourism. There is currently a wide variety of models, activities, and types of accommodation, which in turn are often in need of a "new generation" of rural tourism, based on the management of smart, virtually oriented destinations [20,21], a deeper understanding of the market, and fully integrated professional management systems oriented towards sustainability [22]. The phrase "rural tourism" is frequently employed as an umbrella term defined by geographical location, whereby activities coming within its scope have nothing in common beyond the fact that they take place in a rural context, as opposed to an urban one [23]. Although rural tourism places a premium on existing heritage to create value, it is nevertheless a rapidly evolving area, with significant challenges and business opportunities [24]. Consequently, theoretical accounts and policy decisions highlight the importance of a grassroots approach to rural development, the active involvement of the local community, and the development of small-scale projects underlining "tradition, character and culture" [25] (p. 108). Also fundamental to improving the perspectives of the sector is the involvement of local political leaders in mapping out processes, putting essential services in place, and improving the business environment.

Indeed, in peripheral areas, which have seen a decline in traditional activities [12] and where opportunities are scarce, "any economic diversification is likely to be welcomed" [15] (p. 532) and "tourism is a desirable diversifier" [11] (p. 391). For the "boring peripheries" and in-between areas [26] (p. 740), tourism represents a new means of regional development [27], although it is yet to be seen whether the equation when tourism equals development is more than wishful thinking [12,18]. Much will depend on the local and temporal context, the political will, the cultural and socioeconomic resources available in the territory, and stakeholder commitment. All the foregoing aspects will be dealt with in this case study, in which, additionally, a dialectic will be established between the 'heritagisation' and the exploitation of heritage for the purposes of tourism.

Tourism activities in the periphery can be a viable option for achieving economic development as an effective source of income and employment [12,28], tackling the issues of access whilst rejuvenating and retaining the population [6,18,29]. In this respect, tourism is often regarded as a "catalyst for innovative local development" [11] (p. 383), enabling the reduction of regional disparities [18]. Nonetheless, regions may not always obtain better results, despite receiving more funds [18], as these may be poorly managed [30]. Provided tourist attractions are generated in peripheral areas, unique destinations

and products can be consolidated, encouraging where visitors can travel, with the motivation to participate in diverse experiences [29]. Often these attractions are not sufficient to establish an extensive tourism offer and, thus, local development based on tourism [29] since the scale of attraction, the conservation, and the uniqueness factor of the resource is the one that potentially generates growth of other types of tourism and maintains its viability [6,31]. Thus, the degree of peripherality determines the tourist flow, distinguishing between peripheral disconnected destinations [32] and intermediate destinations [26], accessible by road [29], which often receive so-called “autonomous tourism” or “rubber tire traffic” [33], making it possible to generate further development in destinations closer to densely populated areas [22], although, consequently, it might result in overexploitation and fragility of the spaces [34,35]. The preservation, intervention, and recuperation of heritage, and the value this brings to an area, become an opportunity for sustainable local development [36], contributing through tourism projects that seek to “design new spaces” [37] (p. 290), in which different stakeholders take part. The process of “heritagisation” focuses on those elements that are unique to a particular rural area, rooted in its history, and identifiable as a “marker of regional identity” [37] (p. 275). However, the sheer range and scale of heritage makes it difficult to conserve and promote, particularly if the economic resources are limited [38]. Nor is this aided by the confusion between the notions of resource and product (the latter meeting demand and having a price) [37]. The process by which heritage resources in rural areas are converted into tourism products needs to be located in a post-Fordist context [39]. It is a process which, since the early 1990s and as recognised by ICOMOS [40], has witnessed an expansion into the cultural space [41].

The conjunction of cultural heritage and tourism has been widely studied [41–43], as it opens up possibilities for the economic development of places with a depth of heritage, although at the same time it creates challenges for the management of attractions [43,44]. Such is its importance that it is institutionalised in public policy and local development [45], creating an interdependence between heritage conservation and the development of tourism [42], although this relationship is not without contradictions and conflicts [43]. In this manner, both positive and negative effects derive from the conjunction, most of which are common to rural and heritage tourism.

Integrated rural tourism (IRT) is an approach that seeks to avoid, or at least to mitigate, the problems associated with tourism in rural areas. In this endogenous model, local actors are important because they “benefit from policies that empower them and enhance their long-term well-being” [4] (p. 363). By contrast, cultural tourism is promoted as a means of economic and social diversification [29]. However, in terms of the institutional context, the management of heritage differs from those organisations that regard resources more as assets for tourism [42]. The emphasis is on protecting and preserving heritage rather than ensuring that it returns a profit [43] (p. 33). In order to satisfy advocates of these opposing perspectives, it is necessary to investigate points of contact between them [43].

Of fundamental importance to planning tourism is the coordination and collaboration between stakeholders [46–48], essential to which is the collaborative focus at all levels between those responsible for managing heritage and all that goes with it, and those responsible for tourism and all its resources [43]. All interested parties should be involved in the process [49], as success depends on their commitment. Further, according to community participation theory, the inclusion of local residents in the decision-making process is also important [43], as their involvement in the development of projects has a significant impact [46,50]. There is, too, the issue of leadership and the delegation of responsibilities among the stakeholders [47] in determining the social relationships underlying the construction of a tourist territory [51]. The relationship between management and sustainable tourism should also be taken into account [52].

In this regard, the case study of the town of Mértola (Baixo Alentejo, Portugal) is particularly relevant as it embodies the elements and processes discussed above. It is a small town with a population of around 6000, located in a rural area, which has been in demographic and economic decline since the middle of the 20th century due to the loss of traditional primary activities (see Section 2.2). In 1978,

a process of markedly ideological heritagisation was initiated to stimulate local development, which was supplanted at the beginning of the 21st century by a project to expand tourism.

The main objective of this paper was to carry out a diachronic study into the processes involved in heritagisation, from a tourism and local development perspective, and to undertake an analysis of their social, political, and institutional contexts [53]. The study focused on a singular location in the rural periphery, which has been overlaid, like a palimpsest, with an archaeological and material conception of heritage, foregrounding local resources as elements of identity and awareness of the past. Given the need to seek for the alternatives to tackle the structural crisis, a process of tourism valorisation was chosen in the least touristic area of Portugal. Therefore, these processes in the rural context were analysed. Analysis of the processes involved in this shift to rural tourism includes the roles and background of the stakeholders; the measures, instruments, and actions implemented in the course of heritagisation and implantation of cultural tourism; and a critical assessment of the successes, failures, results, and overall impact. Consideration was also given to the lessons that could be drawn from the Museum Town of Mértola project, and which can be transferred to other locations with significant cultural heritage and committed involvement of the stakeholders.

## **2. Methodology and Case Study**

### *2.1. Data and Methods*

Studying local development through the complex relationships between heritage/tourism and the stakeholders is best achieved by use of a case study approach, by means of collecting in-depth data from a variety of sources [54]. The paradigm has been widely applied to studies of tourism [55], in particular the processes and management of heritagisation [56], roles and relationships between stakeholders and governance [11,28,43,57,58], local/rural development and tourism [25,59], and tourism in the periphery [18,29].

The methodology employed was qualitative, based on interviews intended to collate different opinions and perceptions from the principal actors [57]; to identify social networks and respective power structures [60]; and to determine the effects of heritagisation, the foregrounding of tourism, and the problems deriving from these processes [29,57]. The interviews were semi-structured [61], consisting of open questions, which allowed for digression into related topics of interest [62], enabling us to obtain information on different topics (Table 1). In total five interviews were conducted with actors involved in the processes of heritagisation and the promotion of tourism:

- Interview 1 (hereinafter Int1): political representative of the Town Council, vice president of the Mértola Municipal Chamber (hereinafter CMM).
- Interview 2 (hereinafter Int2): museology and heritage specialist for the CMM; also a member of the Mértola Archaeological Site (hereinafter CAM).
- Interview 3 (hereinafter Int3): archaeologist, director and the founder of the CAM.
- Interview 4 (hereinafter Int4): archaeologist, co-director of the CAM, responsible for management of CAM.
- Interview 5 (hereinafter Int5): local business woman, representative of the tourism sector.

The data obtained from the interviews were complemented by intensive territorial reconnaissance (valuation of the heritage environment, accessibility study, informal interviews with local business interests and residents) and secondary sources centred on: (a) heritage characterisation, the heritagisation process, and tourism promotion in Mértola, based both on the published sources and the planning documents); (b) the prevalent discourses in the conjunction of heritage and tourism, both in published and unpublished research on Mértola; (c) official statistical information for analysing results (Statistics Portugal, hereinafter INE) and official databases (National Tourism Register, hereinafter RNT) [63].

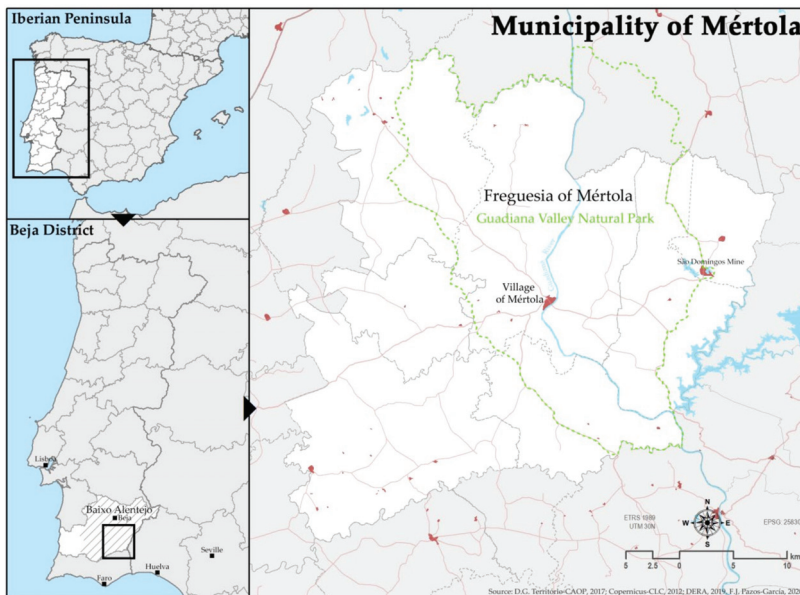
**Table 1.** Questions of the interview.

Block of Questions	Questions	Obtained Information						
		t1	t2	t3	t4	t5	t6	t7
All interviewees	Heritage, tourism, or development idea	■	■					■
	Tourism management, organisation, and planning	■	■					■
	Project objectives with the reference to the Mértola Vila Museu Project	■	■			■		
	Management of instruments and tools	■						
	Project funding		■	■				
	Participating actors and/or characteristics		■		■			
	Role of local population		■					■
	Valuation of resources							
	Heritage, tourism, or development diagnosis						■	■
	Cooperation, participation, and competition	■	■					■
	Models consulted	■	■					■
	Promotion strategies			■				■
	Proposals		■	■				■
For companies	Company data, characteristics, and seniority			■				
	Training, both of employers and employees			■	■		■	
	Origin of a company				■	■	■	
	Employment generated				■	■	■	

Topics of information: t1: processes; t2: heritage and/or tourism relationships; t3: implementation of initiatives, measures, instruments, and actions; t4: actors involved; t5: objectives; t6: results and/or impacts; t7: sustainable tourism and/or local development.

2.2. Case Study: Mértola

The municipality of Mértola is located in the SW of the Iberian Peninsula, in the Beja district (Baixo Alentejo province) of Portugal (Figure 1). It is the sixth largest municipality in Portugal, at 1293 km<sup>2</sup>, and is divided into 7 smaller areas or “freguesias”, considered as parishes (Figure 1).



**Figure 1.** Area of the study, location, and the administrative structure.

It is a peripheral area, whose borderland status has caused the crisis to be keenly felt [64]. Due to the fact that the land is unsuitable for arable farming, the main traditional activities have been forestry, animal husbandry, and hunting, distributed among large private estates. In 1995, the Guadiana Valley Natural Park (hereinafter PNVG), covering 47.39% of the municipality, was created to protect its outstanding natural beauty and ecological wealth (Figure 1).



Closure of the mines and the agricultural crisis in the mid-20th century precipitated a period of decline and rural exodus. In 2018, there were 6202 residents, a loss of 76.17% of the 1960 total. It is also an aging population (58.59%  $\geq$  65), with a very low demographic density (4.80 inhabitants/km<sup>2</sup>) [65] dispersed over 98 population nuclei [66].

Mértola is equidistant (120 km) from the towns of Faro (Portugal) and Huelva (Spain), and likewise from the major cities of Lisbon and Seville (220 km). The nearest sizeable town is Beja (53 km) (Figure 1). Increased road connectivity from the mid-20th century onwards caused the demise of river transport, relegating the town even further to the backwaters, although improved access to the Algarve and Spain at the beginning of the 21st century went some way to counteract this.

The Alentejo is the least visited region of Portugal [30], especially Baixo Alentejo (Table 2), which has seen very little investment. In spite of this, there are several attractions in Mértola worthy of tourist interest, in the form of cultural heritage, e.g., “vila” of Mértola as the museum town; the natural environment (PNVG); and industrial heritage, such as the São Domingos Mine, a disused open-cast ‘Victorian’ copper mine on the western fringes of the Iberian Pyrite Belt (Figure 1).

**Table 2.** Tourism importance in Portugal, Baixo Alentejo, and Alentejo (2018).

Territorial Scope	Guests (Total)	Guests (% of the National Total)	Lodging Capacity (Total)	Lodging Capacity (% of the National Total)
Baixo Alentejo	202,534	0.80	3010	0.71
Alentejo	1,470,950	5.83	23,852	5.64
Portugal	25,249,904	100.00	423,152	100.00

Source [67].

The town of Mértola itself is a walled hilltop city on the right bank of the Guadiana River (Figure 2), the choice of location being determined by its navigability, namely at 72 km from the river mouth, defensibility, abundance of water, and polymetallic deposits [68]. Within the walls, the town is today typical of modern Portuguese architectural style over an Islamic stratum [69] of considerable historic and aesthetic interest [69]. This heritage began to be valued at the end of the 1970s in the form of the “Mértola Museum Town” project, and since the start of the new millennium, the tourism dimension has been foregrounded. In 2017, Mértola was added to Portugal’s Tentative List (TL) (This should not be confused with UNESCO’s “World Heritage List” (hereinafter WHL) of sites with World Heritage status. The “Tentative List” is the result of UNESCO’s recommendation for member States to “submit their Tentative Lists, properties which they consider to be cultural and/or natural heritage of outstanding universal value and therefore suitable for inscription on the World Heritage List.” [70]. Inclusion on the Tentative List is a prerequisite for being declared a World Heritage Site, but does not guarantee inscription on the WHL.) for inclusion on the World Heritage List.

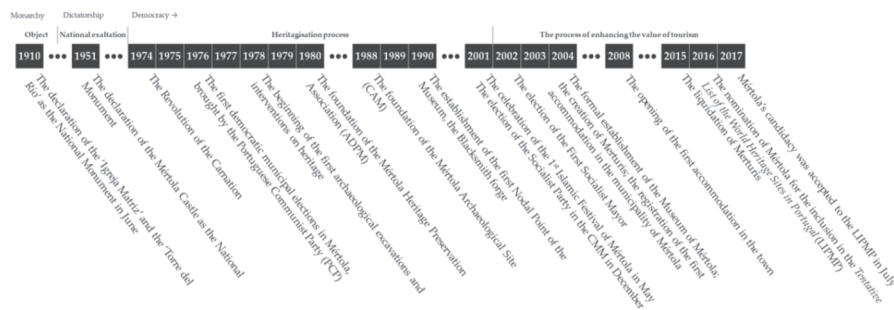


**Figure 2.** View of the town of Mértola from the left bank of the Guadiana river. The wall, the Mother Church, and the castle can be observed.

### 3. Results and Discussion

#### 3.1. Actions Towards the Protection, Heritagisation and Enhancement of Tourism

Three buildings in Mértola have been declared national monuments: the church ‘Igreja Matriz’ (Almohad mosque (12th century), constructed on an early Christian church (6th century), and consecrated after the Reconquista (13th century) [71]) and the ‘Torre del Rio’ (ancient wharf and fortified port structure (5th century), unique in Portugal, controlling access to the port and the movement of goods [69]) (misleadingly known as the ‘Old Bridge’ in English, though it is neither a tower nor a bridge), both in 1910, and the ‘Castelo de Mértola’ (the Muslim fortress (12th century) was remodelled after the Christian Reconquista (13th century) [68]) in 1951 [72] (Figure 3). These declarations of assets have not generated interventions or led to a plan to protect these to be set [73].

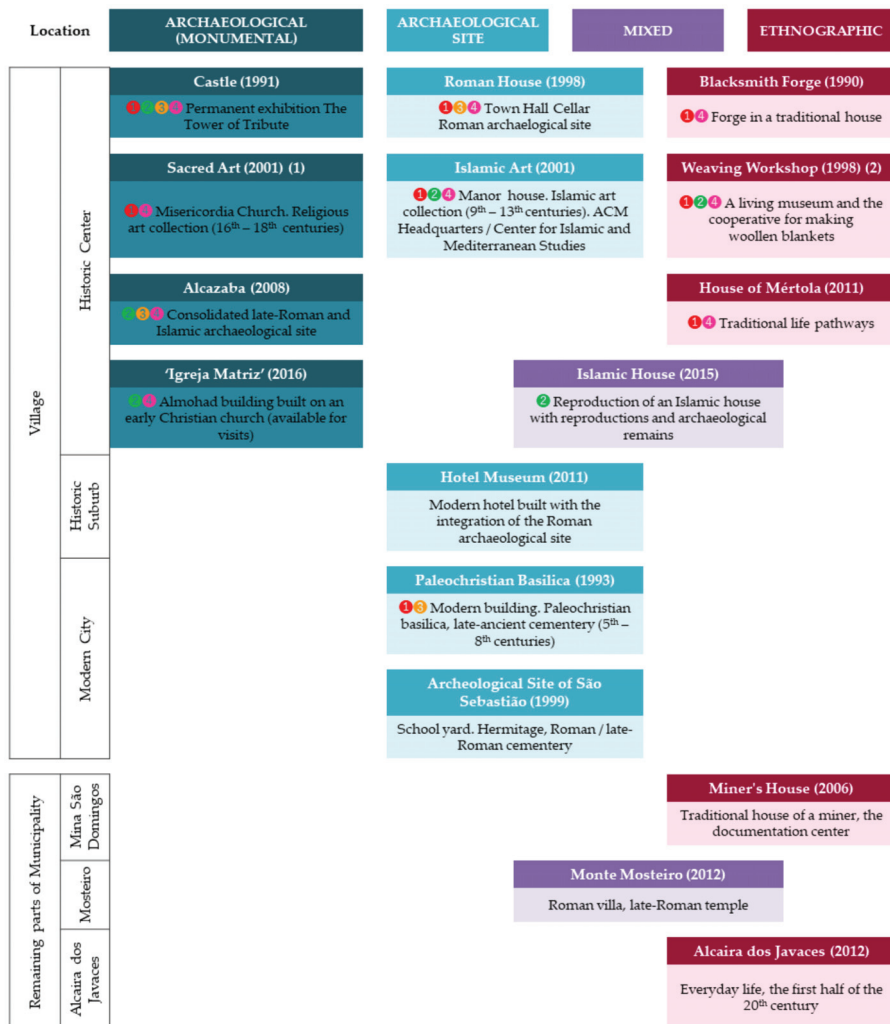


**Figure 3.** The chronology of the main milestones, processes, and political context of the heritagisation and its value for tourism.

The first democratic municipal elections in Mértola (1976) brought the Portuguese Communist Party (hereinafter PCP) (The party continues to take a role in local coalitions to this day.) to power, and the new Mayor set about recovering the town’s historical, cultural, and natural heritage [74], with the guidance of researchers from the University of Lisbon [75].

In 1980, the not-for-profit “Mértola Heritage Preservation Association” (hereinafter ADPM) was established with the aim of conserving and promoting the town’s heritage [76]. Facing the need to invest in infrastructure and services, the municipal authority delegated this role to the ADPM, both parties sharing political and ideological affinities [75]. In 1988, projects being undertaken nationally were required by the ADPM to be split in two, resulting in the “Mértola Archaeological Site” (CAM) being formed to deal with the material cultural heritage, while the ADPM took responsibility for the natural and ethnographic heritage.

The specialist scientific support supplied by CAM to the heritagisation strategy was channelled through the “Mértola Museum Town Project” (hereinafter PMVM) [73]. According to this plan, the ‘vila’, to give the town its historical appellation, was conceived of as an open-air museum [76], incorporating a wealth of archaeological and architectural elements into a route around the centre [73]. In this way the entirety of the town was deemed a single resource [77] (p. 236), gradually incorporating new elements, such as the nodal points of the museum, into the whole (Figure 4). Wherever possible, these nodal points are housed in restored buildings [77] at the site of the archaeological finds [75] (Figure 5).



(1) It is the first collection (1978-1994), which has been moved to this building in 2001. (2) Created in 1986, it has acquired its current layout in 1998.  
**Routes (guided visits):** ● Get to know the Mértola Museum; ● Islamic Mértola (a second itinerary is educational); ● Roman and Late Antiquity Mértola (includes the River Tower); ● Mértola, a historic town.

Figure 4. Museum centres of the Mértola Museum and urban routes. Source: [72,78–80].



**Figure 5.** Images A and B show archaeological intervention of the early Christian temple in the basement of the Igreja Matriz (E-S side), 28 December 2004 (A) and 4 February 2013 (B). The nodal point of the museum (C), seen from the basement, and interpretation of the remains inside (D,E), 8 April 2016. The images highlight the enormous work of heritagisation, its slowness, and its cost.

In 2002, after 25 years of PCP ascendancy, the Socialist Party (hereinafter PS) came to power in the CMM and a period foregrounding the value to tourism of Mértola's heritage was initiated. This process was based on the conservation and recovery of heritage (involving high costs and low profits).

Although its museological underpinnings were initiated years earlier, the Museum of Mértola was formally established in 2004 by the CMM, in response to abnormalities in the management structure, which prevented its inclusion in the Portuguese Museum Network [73], with scientific specialist responsibility being delegated to the CAM [78]. Efforts to diversify the range of offers from the museum were set in motion from 2006 (Figure 4). In 2001 (that is, before the political shift of power in municipality), the Islamic Festival of Mértola (hereinafter FIM) was inaugurated, organised by the CAM under the auspices of the CMM. A biennial festival taking place over 3–4 days in May. With the accession of the PS, the FIM became an important element in getting the town noticed on the tourist circuit, with the help of media promotions and links to similar events [73].

The tourism-oriented heritage organised within the town included guided visits and themed walks around the centre, leading from node to node of the outdoor museum (Figure 4). The routes were managed by the Tourist Information Centre, which was dependent on the CMM [81], in collaboration with the CAM.

Next, 2004 saw the creation of Merturis, a publicly owned enterprise with the objective of making the most of tourism opportunities with the municipality through the development of products, the projection of an image, and the implantation of strategies to attract, incentivize, and retain tourism-oriented businesses, which would consequently provide local employment [82]. Public company auditing by the Portuguese government led to its dissolution in 2015, without having achieved its objectives.

Following the dissolution of Merturis, the promotion of Mértola passed to the “Visit Mértola” web portal [79], a collaboration between the CMM, the Serrão Martins Foundation (in representation of the São Domingos mines), the Mértola Museum, and Visit Portugal, with the exclusion of the remaining local actors, focussed on advertising the range of tourist activities around the municipality.

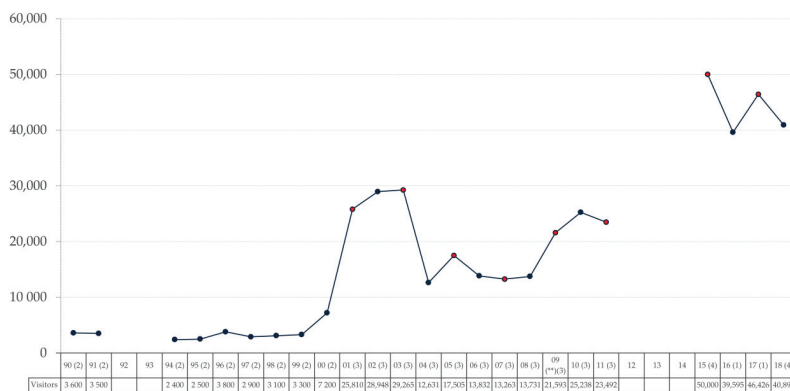
The most notable initiative of the CMM has been the nomination of Mértola for inclusion in the “Tentative List of World Heritage Sites in Portugal” (hereinafter LIPMP) drawn up by the National Commission for UNESCO, as a first step towards recognition as a UNESCO World Heritage Site (hereinafter WHS). The candidacy of Mértola was based on three of UNESCO’s ten selection criteria, (following UNESCO’s own numbering and descriptions) [69], namely:

- Criteria ii. “to exhibit an important interchange of human values” (cultural exchange)—the evidence of diverse civilisations in Mértola, visible in the organisation, architecture, archaeological remains, and traditions of the ‘vila’ (with special emphasis on the Roman, late antiquity and Islamic periods).
- Criteria iii. “to bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared”—early Christian remains.
- Criteria iv. To be an outstanding example of a type of building, architectural or technological ensemble, or landscape, which illustrates (a) significant stage(s) in human history—the remarkable strategic location of the town in terms of defence and river transport (the castle, city walls, and ‘Torre del Río’).

The proposal was presented to the National Commission in June 2016 and was initially rejected (Int2). Nevertheless, their recommendations were taken as a positive response (Int1, Int2, Int4), and on 1 July 2017, without these being taken up, Mértola’s candidacy was accepted and the town was included in the LIPMP [69].

### 3.2. Evolution of Tourist Activity in the Municipal Context

Taking the number of visits as an indicator of the success of the PMVM, the Mértola Museum has experienced ups and downs (Figure 6). The turning point was the first FIM (2001), which saw the number of visitors increase by 72.10%. The standoff between the CAM and the CMM led to a period of stagnation (2004–2008), with growth returning once relations had been re-established. No increase in visitor numbers can be detected as a result of the town’s inclusion on the LIPMP. The Mértola Museum receives more visits than any of the 24 museums in Baixo Alentejo, representing 32.92% of the total within the subregion in 2018, and 62.46% in 2017 (a FIM year).

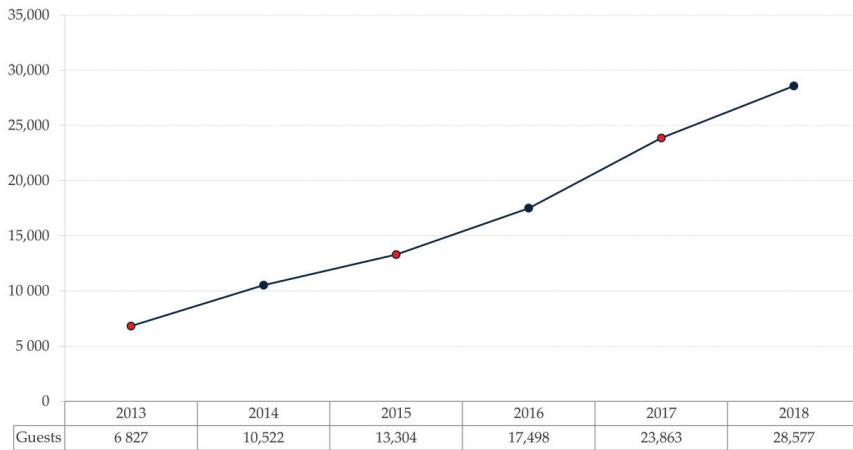


(\*) The “registered visitors” do not coincide with the real ones, since it is an open set, but it has 3 registration points: Igreja Matriz (1), PIT (2), The Tower of Tribute (3). Historical set (4). (\*\*) Until September. In years indicated in red the FIM is celebrated.

Figure 6. Visitors to the Mértola Museum, 1990–2018 (\*). Source: CMM visitor data taken from: [67,75,78,83,84].

The income estimated for the Mértola Museum is 1.11 €/visitor in 2012 [83], which represents 3.70% of the CMM’s spending in culture and sport, including the museum [67].

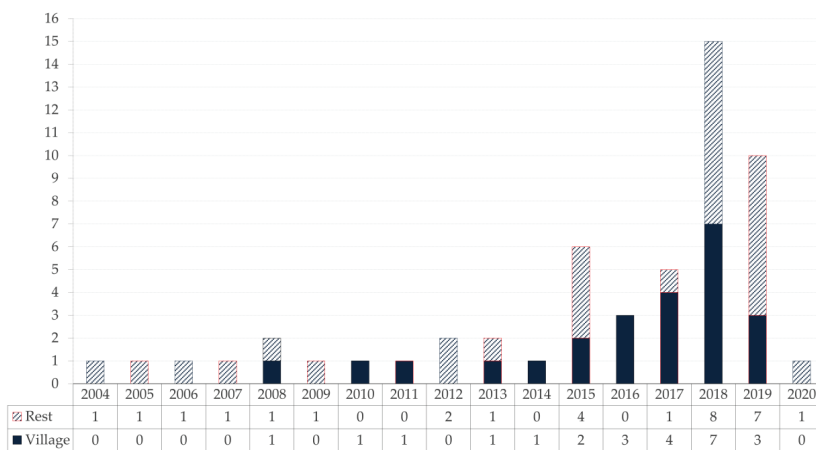
The pattern of tourism over time is reflected in the official statistics [18] (p. 1788). The number of nights spent in tourist accommodation in the municipality showed a steady growth (Figure 7) between 2013 and 2018 [67], peaking in the years in which the FIM was held and 2018 (in which the number of guests reached 69.88% of museum visits). Its share of overnight stays within the subregion went from 6.11% (2013) to 14.11% (2018), taking the municipality from fifth place to second. The average length of stay was 1.8 days (2018) [29].



In years indicated in red the FIM is celebrated.

**Figure 7.** Guests in accommodation in the Municipality of Mértola, 2013–2018. Source: [67].

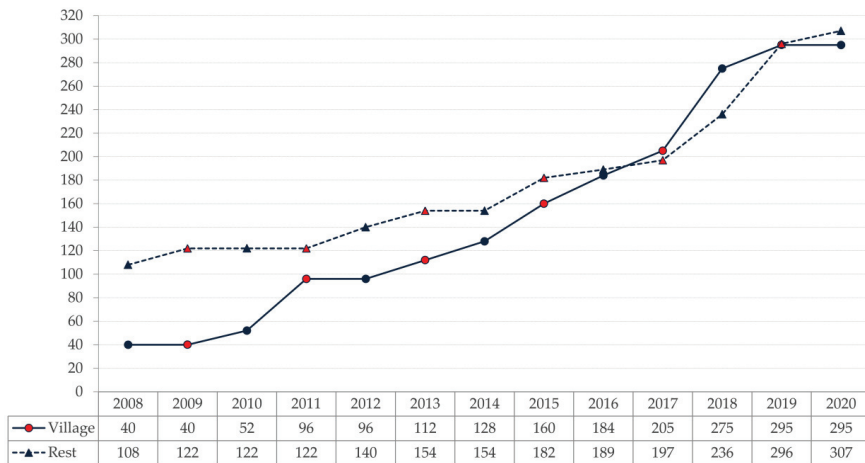
The promotion of tourism by the Mértola Municipal Chamber (CMM) began in 2002 [85], reaching 24 places of accommodation in 2020, the first of which was registered in 2008 (Figure 8) [63]. A range of accommodation options have become available [63]: 15 local accommodation points, 7 companies in the rural tourism sector, and 2 hotel establishments, accounting for 32.54% of places.



In years indicated in red the FIM is celebrated.

**Figure 8.** Evolution of the tourist accommodation register in the village and in the rest of the municipality of Mértola, 2008–March 2020. Source: [63].

In total, at the time of writing, there were 295 beds available in the town (Figure 9). It was predominated by small establishments and only hotels can accommodate groups ( $\geq 44$  beds).



In years indicated in red the FIM is celebrated.

**Figure 9.** Evolution of the number of places in tourist accommodation in the village and in the rest of the Municipality of Mértola, 2008–March 2020. Source: [63].

Merturis was first to offer activities in 2004. At the time of writing, in 2020, there were seven companies based in the town, including six focussing on tourist activities and one travel agency, five of which offer cultural activities—three solely cultural and two in combination with other types.

There were also 20 restaurants of varying types in the town (55.56 of the total in the municipality) with 1138 seats (60.34% of the municipal total) [79]. A total of 12 establishments had a seating capacity  $\geq 50$  amounting to 1083 seats.

An increase in the number of shops selling artisanal products and/or souvenirs (four) can be noted at points of access to the historical old town and in workshops within its walls (two), manifestations of heritagisation, in particular training courses for recovering of traditional crafts (Int4).

The companies involved in heritage and tourism can be divided into three types (Int4, Int5):

- Entrepreneurship: small start-ups with no background in the field (specialist public employees) or self-employment deriving from training either professional or at a university.
- Sectorial diversification/income supplement: small-scale initiatives aimed at the diversification of typical products or noncorporate employment, mostly at local accommodation.
- Investment: internal investment concentrated on hospitality and accommodation by agents in other productive sectors setting up separate businesses and external companies mainly focused on investment funds and real estate. These are companies with complex business structures.

There is a predominance of personal investment (Int1, Int4, Int5), and the co-financing of initiatives with European grants managed by local action groups is scarce, and generally limited to institutionally managed investment such as the CMM, CAM, and ADPM (Int4). Some specific projects have been financed, with seven initiatives in town receiving support between 1996 and 2015, namely four connected to tourist accommodation, two restaurants, and one tourism activities business. The tendency is to finance investment projects beyond the reach of local entrepreneurs.

Tourism is diversifying the Mértola economy (Figure 10). The two sectors with the highest number of companies are the primary and service sectors. The “accommodation, restaurant, and similar businesses” sector represented 12.47% in 2017, demonstrating a higher degree of stability than other activities.

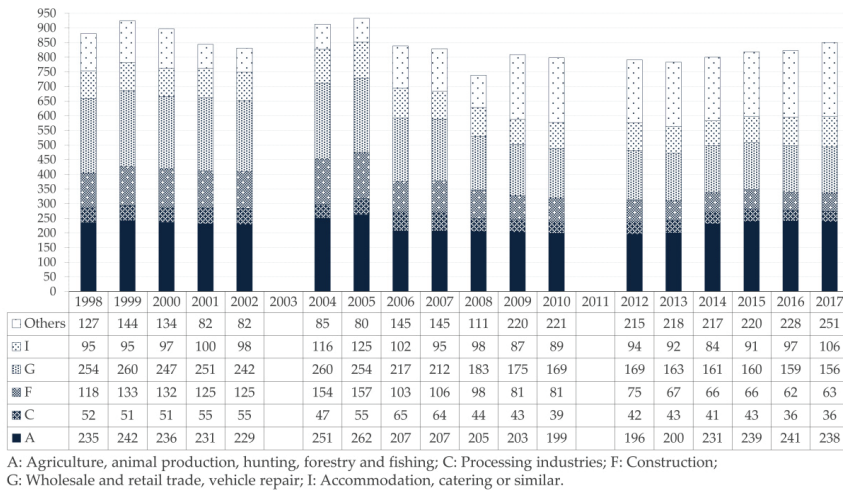


Figure 10. Evolution of the number of companies by type of activity in the Municipality of Mértola, 1998–2017. Source: [67].

In terms of business volume (Figure 11), it is notable that the service sector has increased while the primary sector has stagnated. After a period of slowdown brought on by the international economic crisis, the hospitality sector, especially accommodation and restaurants, experienced significant growth from 2014 with an accumulated increase of 81.34% between 2014 and 2017. Total income per tourist bedroom in 2017, as an FIM year, rose to 1474 €, which was an increase by 80.19% over 2013, while the average spending of guest/day was 10.26€ [67] due to the abundance available of local accommodation.

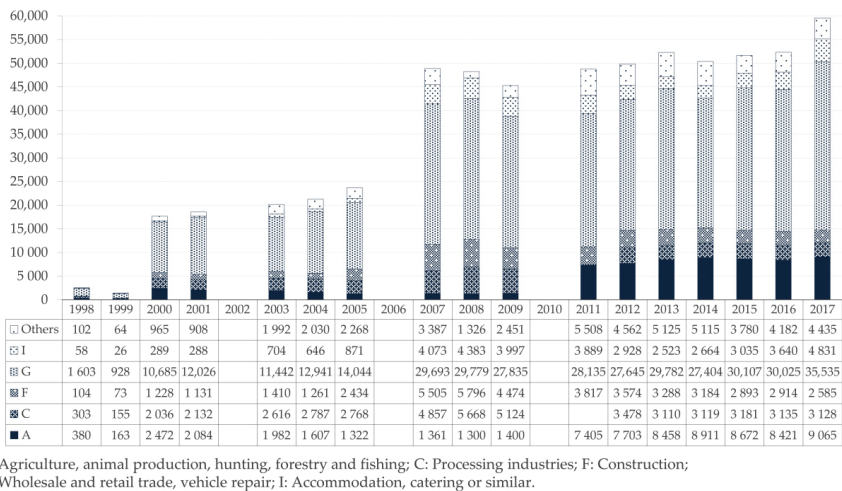
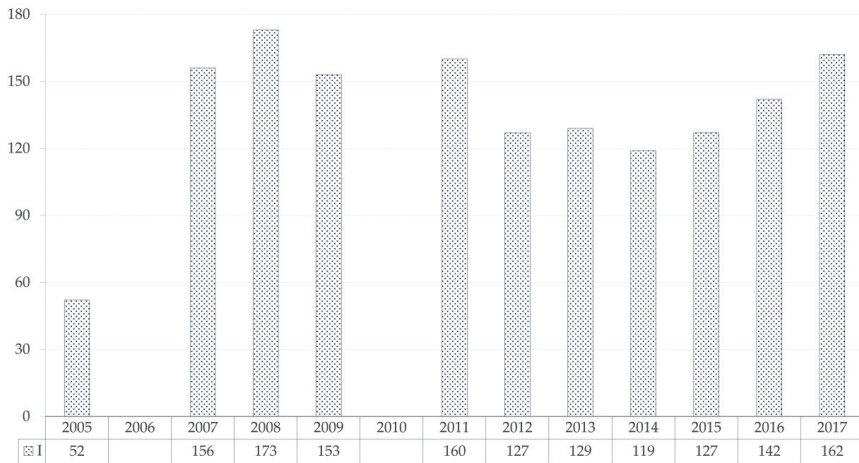


Figure 11. Evolution of business volume (thousands of Euros) of companies by type of activity in the Municipality of Mértola, 1998–2017. Source: [67].

In 2017, the hospitality sector employed 11.88% of the total workforce. Since 2014, the trend has been upwards, with an increase of 26.54%, although it is still not the major sector in terms of employment (Figure 12).



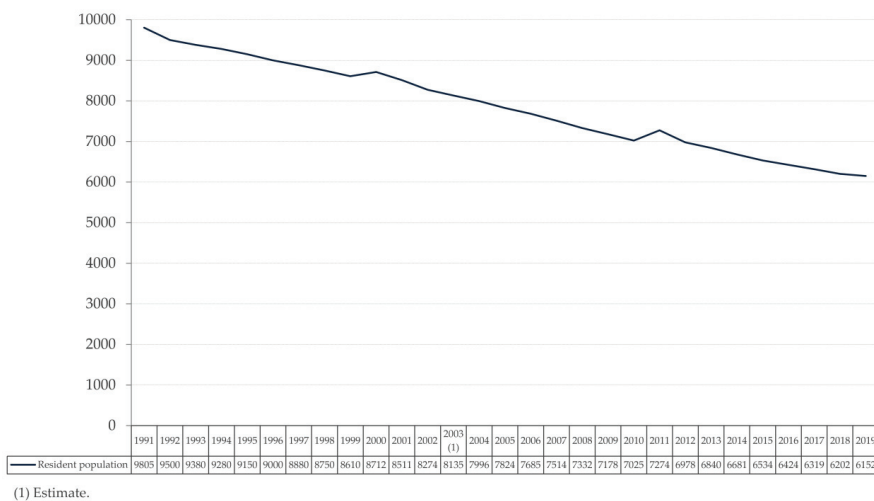


I: Accommodation, catering or similar.

**Figure 12.** Evolution of employment in accommodation and catering companies in the Municipality of Mértola, 2005–2017. Source: [63].

The largest single employer in the municipality is the CMM, which has 316 employees [86], or about 10% of the local workforce. Eleven of these employees work in the area of culture, i.e., representing 3.48% of the CMM total, and 14 in the area of tourist information and museums, namely 4.43% of the total [86]. It is not possible to give the corresponding number of workers for the CAM as this is the variable in terms of the projects and the incorporation of workers and researchers is seasonal. The skilled workforce, university graduates and technical specialists, is employed mainly in the CMM and CAM. The qualifications are, in part, the result of the training programmes (EPJBC, ALSUD) [77].

According to the statistics, the rural exodus continues, with a decrease of 37.26% in the population between 1991 and 2019 (Figure 13). However, the decrease slackened off between 2010 and 2019, with the period 2018–2019 showing the least loss across the yearly intervals at the rate of  $-0.81\%$ . The net balance is negative, although the rate has reduced from 2015 going from  $-1.15\%$  to  $-0.38$  in 2018.



(1) Estimate.

**Figure 13.** Resident population in the Municipality of Mértola, 1991–2019. Source: [67].

The process of heritagisation has taken place at the same time that residents moved out of the historical town centre to take up residence in the new part of town or to leave altogether. This outflow contributed to the deterioration of the centre, which is taking considerable time, money, and effort to restore. In order to prevent the emptying of the historical centre and to encourage people to return, the CMM established a package of measures to support the rehabilitation of local heritage [78], aimed at: (a) restoring buildings for use by the municipal services, such as the CAM, the museum, and so on; (b) the promotion of events and economic activities, specially the FIM and similar celebrations; and (c) social housing.

### 3.3. Assessment of the Actions in the Context

With the restoration of democracy to Portugal in 1974, the notion of heritagisation was popularised and the concept of so-called historical value began to take place [73]. The previous patrimonial declarations responded to the protection of the object in 1910 and to the national exaltation, namely the dictatorship.

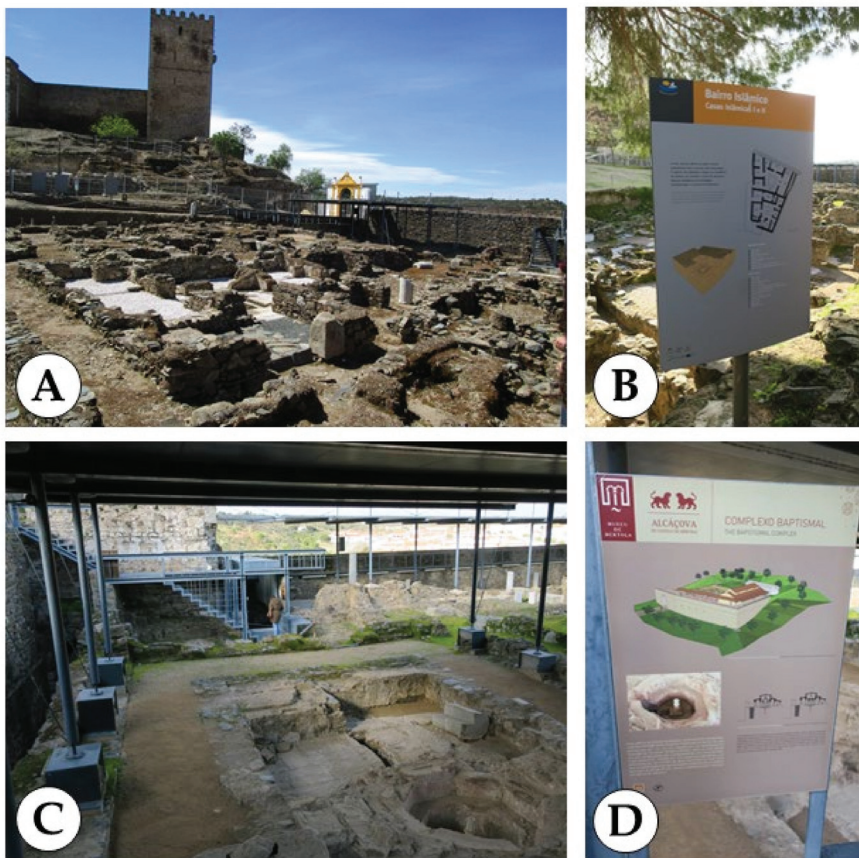
The process of heritagisation in Mértola would be carried out in a social, political, and ideological context [87]. The notion of “integrated development founded on heritage resources” [75] (p. 32) was taken up, in which heritage was understood as “collective memory”, and the overall objective was local development through the involvement of the community [76]. At the same time, social and cultural capital were recognised as the foundations on which the project was built [10,11].

Since 1980, the interaction between public and private institutions—the CMM on the one hand and the CAM and ADPM on the other—has been a complex process. The sheer scale of the conservation involved became a major challenge [24] (Figures 5 and 14), particularly in view of the lack of ongoing funding [43]. The CMM jointly funded activities, the museum, and provision of space, while the CMM, CAM, and ADPM sought external funding at regional, state, or community level [88] for intervention/research projects [89].

The foundation for the project was an intricate museographic project, based on the notion of a “community museum” [29] (p. 1), envisioned as an educational tool for exploring identity and heritage at the service of humankind now and into the future [90]. The PMVM received recognition [74] for its good practice, and attracted considerable national and international attention as a result of its scientific content, which went beyond the university system, methodology, endogenous orientation, the inclusion of local residents and their concerns, and the divulgation of the results [77,78]. It also took on the task of training locals [76], beginning with courses for specialist personnel sponsored by the ADPM (1978–1985) [75]. The PMVM incorporated training for the local population [87], which began with ADPM courses for technical staff (1978–1985) and later became the Bento de Jesús Caraça Professional School (hereinafter EPJBC) [78].

In a peripheral territory incorporating different elements—such as a natural park, cultural heritage, and outstanding landscapes—it was deemed necessary to create, promote, and sell products [29], overcoming the limitations imposed by its location on the periphery so as to make these viable [6]. As a consequence, since 2002, the CMM’s cultural and tourism policy focussed on [83]:

- (a) Stimulation of tourism packages around different approaches, i.e., heritage, nature, active lifestyles/sport, gastronomy, industrial/mining heritage, and hunting.
- (b) Expansion of initiatives throughout the municipality, not only the town.
- (c) Creation of quality-focussed products and image for commercialization.
- (d) Increased involvement of local population.
- (e) Active search for private investment.



**Figure 14.** Alcazaba of Mértola (the nodal point of the museum). The Excavation of the Islamic Quarter with the castle and the Tower of Tribute in the background (A) and the interpretation signage (B), 9 February 2019. The intervention to consolidate the baptismal complex (C) and the interpretation signage (D), 8 April 2016. The images show the great space of intervention and the process of conservation of the archaeological heritage.

Although the museum was doubtlessly the maximum expression of heritagisation, and the vila as its most important resource, from a visitor’s perspective, it was recognised as of limited interest [91], with preservation and research taking precedence over tourism [29] (Figure 14). It did, however, embody a variety of diverse perspectives, particularly socio-cultural, religious, military, and other activities, such as a research centre and traditional crafts, which, considered jointly, enhanced its potential as the tourism attraction [41]. The establishment of these routes around town helped to reinforce the idea of a unified collection of elements [92], although their physical dispersion made it difficult to integrate all of them into a whole.

The FIM has proposed as an innovative event, in line with authenticity, to promote Islamic heritage and local history [93,94], through a series of cultural and artistic activities and scientific conferences, all of which were held within the town walls to revitalize the historic centre and involve residents. Community-based events such as this are important to the life of peripheral areas [29,95], and can become important cultural attractions [41], capable of attracting more than 20,000 visitors.

Merturis has not achieved its objectives, and Visit Mértola, dedicated to all tourist activities in the municipality, has not managed to increase the necessary participation of private capital in the promotion [96] or public–private collaboration [58], nor has it created a unique image of the destination or the brand [97,98].

Finally, in the preparation for its candidacy that followed, the town pursued its bid to become a WHS in the hope that such a declaration would kick-start tourism in the area [99]. The view of the CAM was the approach that represented a political project related to the promotion, rather than technical matters (Int2, Int4), and pointed out the lack of a strategy, whilst acknowledging its potential.

### 3.4. Positions Indicated Among Stakeholders

Each of the actors has their own and “constructed reality” [100] (p. 79) interests [46], given voice by the prevailing discourse and shaped by a representative framework [101]: the CAM takes a conservationist position, while the CMM follows a more commercial view. In short, the conflicting interests represent the classic trade-off between heritage, conservation or curatorship, and tourism [43]. Each discourse aligns itself with particular ideological projects and modes of understanding the progress, especially heritagisation in terms of the safeguarding the cultural identity of the local inhabitants and the promotion of tourism that bring tangible economic benefits to the local population.

For the CAM, their conservationist position is motivated by ideological beliefs clustered around collectivism and egalitarianism [73]. Both public (CMM) and private (CAM/ADPM) initiatives should be aligned on issues of cultural identity [102], for which heritagisation is the means to contribute to “community development”. In this view, cultural values should always prevail and the tenets of tourism are disparaged as commercialism, where profit is prized above the inherent value of heritage [103], and there is a reluctance to fix prices [42,104]. Although this discourse has developed over time [75], tourism remains a result rather than an end in itself, something that could contribute to maintaining the local inhabitants [73] and their identity [89,102]. The interests of the CAM are not in tourism but in heritagisation. However, as this needs to be financed (Int2), they opt for small-scale initiatives “so as to avoid multinational hotel chains” [89] (p. 1).

By contrast, the commercialist discourse of the CMM is linked to a view of local development as a coming together of endogenous and exogenous, public and private forces—endogenous foundations with an outwards projection focusing on searching for investors and finance. The emphasis is on tourism as generator of wealth, with the role of the CMM being that of curating and promoting, while private enterprises take responsibility for tourism initiatives. In this vision, tourism becomes a development strategy for stimulating cash flow and bringing in sufficient returns to finance heritage conservation, but always on the principle that the “user pays” [42]. Nevertheless, the tourism-focused view of development “runs the risk of neglecting other important factors and processes” [26] (p. 740). Although politicians insist that tourism could reduce regional disparities, expectations tend to be over-optimistic [18,30].

The CMM’s local policies regarding the process [82] have generated informal agreements between public and private actors, with hegemonic discourses that “can constitute a ‘regime’ that in turn shapes local policy-making” [58] (p. 25). A balance needs to be reached between the policies of heritagisation and tourism without losing sight of the issue of sustainable growth [105] and creative construction/destruction [106].

Stakeholders can play a significant role. They can become empowered and improve well-being over the long-term [4], acquiring agency as a result of their own influence and through the relationships developed among themselves [47,99]. Collaboration between stakeholders has thus become a major issue [49].

The main stakeholders in the heritagisation process are the CMM and the CAM, also previously known as the ADPM. They act at the same level, each has its area of expertise, but they share the same discourse, ideological programme, and interests, in which the principles of cooperation [46] and collaboration [27,107] are paramount. An early issue was that of leadership [108], a role initially filled

by the first democratically elected mayor (Int3, Int4), who carried out the role of managing relationships between the interested parties [4]. After the death of the mayor in 1982, the ADPM, replaced by the CAM in 1988 and thereafter, took on the scientific and intellectual leadership, their authority being recognised by the CMM. The cooperation successfully initiated a large-scale process of heritagisation (PMVM).

When the socialists were voted in to govern the CMM in 2002, the conflicting perceptions and issues of discourse [57,101] between the political parties and their leaders (Int2) produced a rift. This led to a change in relations between the agencies, and hierarchies began to appear through the CMM, taking over the leadership alongside rivalries and disagreements [57]. In 2004, the CMM put into action a plan to amplify the number of stakeholders to include Merturis and the Serrão Martins Foundation (a foundation set up for the conservation and projection of the São Domingos Mine visitor centre, which is a short drive from Mértola.), limiting the power of the CAM/ADPM and acting as a counterweight. At the same time, the CMM enlarged its own power by taking over the running of the Mértola Museum, albeit deferring to the authority of the CAM in scientific matters (Int4). These tensions manifested themselves in the interruption of the heritagisation process, the halt to the training programme, and the poor outcomes in terms of tourism.

When, in 2008, the socialist mayor left the post, contact between the CMM and CAM/ADPM was resumed, and although there remained a gap between their viewpoints, “there was a new injection of life in the heritage question” (Int4). The rapprochement between the two sides reinvigorated performance and the achievement of objectives [43,47], reactivating the processes of heritagisation and promotion of tourism, and setting in motion again the training programme under the stewardship of a new entity, named as the ALSUD Training School [109]. The renewed impetus to attract tourism brought a new stakeholder in to the frame, the Association of Business Owners (Int5).

Criticism of the leading figures within the CMM by the CAM includes “not being up to the task (...) conservation is not a course of action” (Int2) and “wanting to live only off tourists” (Int4). The CAM also underlines that “the CMM shouldn’t be doing everything (...) and the private sector [referring to the CAM/ADPM] should also be a part of things” (Int2). For its part, the CMM maintains that “the primary objective is the scientific [heritagisation], on the basis of which tourism can be developed, and then in its turn local development” (Int1). The discourse does not attempt to delegitimise the CAM; it recognises its expertise and good practice [83] and its authority in scientific matters (Int1), but it claims for the CMM a role in the management and promotion of tourism, and, given the similarities with electoral campaigning, the projection of the town to the wider world (Int1).

The actors were aware of the dangers inherent in a lack of coordination and collaboration, and recognised partisanship as the main obstacle to achieving this [83]. It was clear that strategies for improving relations were needed [46], along with a network for facilitating decision-making in matters concerning the development of tourism [110,111], but neither side, it seemed, was willing to take the first step towards opening up the dialogue [43]. The business sector sensed a political/ideological impasse which “meant that [tourism] didn’t work” (Int5). According to Da Rosa [109], actors themselves should not be foregrounded but rather the result of their collaboration and the instance the recommendation fell on deaf ears [51]. In some cases, such as that of the FIM, the existence of common interests strengthened relationships, but in others, such as that of the LIPMP project, it amplified rivalries [58].

One thing that appeared in the objectives and discourse of more than one of the actors (Int1, Int3) was the importance of the participation of local residents, given that this was considered crucial to the whole process of development, and a means of avoiding conflict and bringing stability to the projects [112,113]. It lay at the heart of the question of identity and was considered to be closely connected to education and awareness (Int1, Int2, Int4), and to reinforcing the community’s confidence to manage its heritage [43,112]. At the start of the heritagisation process, the political affinities of those involved led to the involvement of young people in the project [75], and their participation in the ADPM/CAM (Int4), which can be viewed as kinds of “community heritage groups” [56] (p. 459). In fact, Duarte [73] underlined local empowerment in two respects: (a) the diversification of cultural facilities

and (b) the implementation of mechanisms for the promotion and participation of different social agents. Despite this, starting from 2002, a gradual disaffection of the locals with the archaeological activity, the heritage, and museums began to be noted [73,109]. The CAM put this shift down to “a departure from the original idea on the part of the PS” (Int4), while the CMM blamed it on the fact that the results of the process were not sufficiently visible [83]. A deeper look at the causes is required in terms of discourse, unfulfilled expectations, and stakeholder attitude, among others.

The heritagisation process included certain objectives stated in the PMVM, but the CMM did not develop any specific objectives for strengthening tourism beyond “local development”. There was no plan outlining the strategies to be followed, as testified by the absence of an official heritage declaration for the complex and the existence of a Plano de Salvaguarda e Valorição do Centro Histórico da Vila de Mértola [114], a town planning document, revised in 2017, in which the focus was solely on housing-related matters. In order to create a model of governance that enhances tourism sustainability while mitigating negative effects [15], developing viable and temporally and environmentally sustainable attractions [6] it is necessary to define objectives, formulate strategies [57], and implement measures and actions through a participative process. Such a model would also enable the search for finance to palliate the negative effects of peripherality [6], at the same time that innovations in the tourism sector generated new interactions and improved relations between stakeholders, implementing institutional changes [11]. The inclusion on the LIPMP could contribute to this, although it would require a thorough further study.

### 3.5. The Successes, Failures, Results, and Overall Impact of the Processes

The increase in the number of the visitors to the Mértola Museum (Figure 6) indicates its importance and consolidation as a heritage destination [29]. While the confrontation between CAM and CMM has caused stagnation (2004–2008), later, as the collaboration resumed, growth has been observed once again [27,107]. Although there was no increase in the number of the museum visits due to its inclusion in the LIPMP, there was an increase in the number of guests stays (Figure 7).

Tourist activity indicates a certain marked seasonality, as detected in other peripheral spaces [29] with overnight stays concentrated in summer (38.3% in 2018) and May in FIM years, complicating business viability [12]. Nonetheless, there are more incidental trips with a purpose [29], as shown by the increase of overnight stays in the recent years (Figure 7). However, the organisation of individual travel and the predominance of the use of one’s own car [33,115] determined connectivity and distance to be key factors [29] with a predominance of national tourism and on the borders, especially on the Spanish side.

When the PMVM was initiated, there has been no tourist offer in the municipality of Mértola. The opening of tourist accommodation in the town has opened since 2008, coinciding with the reestablishment of the contacts between CMM and CAM. Most of the openings coincided with FIM years. The year 2018 provided the turning point due to the expectations generated by the inclusion of the village in the LIPMP. The presence of different types of accommodation demonstrates an adaptation to different markets [24], however, accommodation without internationally recognised quality standards predominates [27].

In order to attract and retain visitors, and so generate income, it is important to be able to offer a range of activities [116]. This offer has appeared since 2004 as a result of the Merturis activity, while enhancing the competition for private businesses (Int5). Once again the effect of the years in which the FIM took place can be seen in the increased demand, alongside the impact of inclusion on the LIPMP, specifically, the founding of two companies in 2017.

Gastronomy is a vital factor in rural and cultural destinations [117]. The offer of Mértola is boosted through traffic breaking up the journey at roadside establishments [29], which again introduces the problem of seasonality.

The institutional context is viewed favourably as a key to development by the companies (Int5), which highlight the promotional efforts of the CMM and the simplification of administrative and

legislative procedures. Entrepreneurship, which is dominant and more dynamic compared to the other types of business, has been driving the range of activities available based on leadership, and opening up new opportunities in the relatively underdeveloped rural tourism sector [118], where there is a little business culture [12]. Nevertheless, at the time of writing, some 51.72% of business volume connected with accommodation and activities was concentrated in the hands of four groups, namely two entrepreneurs with a variety of ventures, a hotel company, and a foreign-owned real estate business.

The situation of deprived areas on the periphery make a flow of investment necessary [119] in a sector of high costs and low returns [12], and where the local public initiative focuses on revitalization/promotion (Int1). Financial and specialist technical support is essential in the long term [12,27] to avoid/limit the ingress of capital from outside.

According to the head offices of the companies involved, outside investment in local real estate has been growing over the last few years, which has had a negative effect on capital accumulation [18]. In addition, the growth in online platforms for managing accommodation is displacing local involvement, to the detriment of the available options [120], and depleting the value added. On the plus side, the platforms make the process of booking rural locations far easier, but the dominance of external operators remains a challenge [12].

The heritage and tourism represent direct and indirect employment opportunities, as well as self-employment [22], one of the chief objectives of rural tourism [118], but the structure of tourism may not be so attractive to the local population [12] due to the limited number of jobs it creates. Jobs are being created within the sector, at the same time that the primary sector workforce is diminishing [29], with an average of 1.53 workers per company, although this varies according to the type of establishment and its capacity.

Employment in this sector is especially susceptible to the effects of seasonality [95], which can be particularly felt in the smaller companies [121]. Problems connected to the lack of a business culture and a prevailing agricultural mentality can also be noted (Int4, Int5), and there are human resources recruitment problems (Int5). Another problem that has been noted is the uprooting of the workforce [15], as many companies are controlled by external groups, although they do create employment. The available data do not indicate whether it is among the most disadvantaged groups that employment is created [122], whether there is any hidden employment, and what the repercussions are for the labour market and unemployment. Exploring these issues would increase our understanding of the processes of local development and power relationships [123].

Rural tourism is conceived of a means of attracting and anchoring a stable population [6,9,18,29]. The slowdown of decline may be related to the dynamism of tourism and the training efforts provided by EPJBC and ALSUD has partly provided the possibility to fill in the lack of essential necessary skills [12]. Nonetheless, it is necessary to increase qualified employment in tourism business to avoid depopulation processes.

While tourism has allowed the historic centre to gain interest with the rehabilitation of traditional buildings (Int2, Int4) as tourist accommodation (13) and second homes [85,124,125], it has resulted in its depopulation and the touristification processes [85]. As a result, the gentrification process has been summed up with the ghettification (Int5) due to the municipal policy generating a complex balance circumstances. There is a risk of theming, such as can be observed in other comprehensive heritage projects, such as that of Óbidos [73].

Among the positive cultural impacts that are worth noting are the reappraisal of the town's heritage, which had been lost or undervalued [126], the cultural capital [127], and the authenticity and preserving of identity [73,128,129]. However, the degree of authenticity in the process of foregrounding tourism should be identified as "attraction-based identity" [130]. The discrepancies between the project and local residents is leading to the "deliberate" construction or adaptation of identity around the cultural experience [130] (p. 39), prioritising what the tourist at times perceived, i.e., banaliation, compared to what the heritage might truly be. A clear example of this is the FIM, which mixes

the local with the universal, is not centred on the participants and their experiences, and leaves the local population feeling detached from their roots (Int1). There is, too, the ongoing debate about the commodification of rural space [131] and culture [59,124], and the converting of authenticity, or identity, into merchandise, both of which call into question the development processes [132].

Since the 1990s, the issue of sustainability has been an additional construct in the debate over rural tourism [133] and cultural tourism [52,134,135]. In this regard, the most serious questions concern how to manage visitors to an area, how to control numbers, and how to establish limits [34], especially when there is a peak in demand for events, e.g., in FIM, or a marked seasonality, issues which require further study in order to establish reliable indicators of sustainability.

The institutional discourse, encapsulated in the document, “profitability, activation and sustainability, thinking of ways to generate wealth and further energize the local economy” [83] (p. 102) argues a contrary view to the capping of capacity, establishing a positive correlation between the number of visitors and development [136]. Nor does sustainability appear in the discourse of the business interests (Int5). Concern in this respect has only been voiced in the CAM, which fixes the maximum number of attendees at the FIM at 40,000 [76]. Indeed, there barely seems any awareness of the purely mathematical limits with respect to providing services, e.g., the town can accommodate 295 people/day and the catering service can provide 9104 meals with a turnover of eight services per seat, while the maximum capacity of the rest of the municipality is no larger than 307 people/day in terms of accommodation and  $\geq 6000$  meals.

It is evident that the rate of growth puts pressure on sustainability, as the ADPM noted in 2007 [82], and the effects of the town’s inclusion on the LIPMP also need to be taken into account. The implications of potentially being declared a WHS could be manifold, and it is quite possible that they do not match expectations [43,137].

#### **4. Conclusions**

In the town of Mértola, a peripheral territory with fewer opportunities and a structural crisis, historical heritage, its conservation, and its value for tourism has converted into the comparative advantage [12] that generates opportunities [15,36] for local development [14]. However, the substantial amount of the heritage increases its conservation costs [38] and hinders the continuity of conservation projects.

The social, political, and institutional context [53] defines the processes of heritagisation and its value for tourism, which generate the dialectic between heritagisation and the exploitation or the commodification of heritage, as well as its overall perceptions [42] and the conceptions of development that are significantly dependent on dominant relationships and discourses [101]. Firstly, the cooperation [46–48] and then the competition between private (CAM, ADPM) and public (CMM) actors indicate contradictions and conflicts. The recovery of the collaborative approach [42] improves the results that are reflected by the increase of tourist supply and demand.

From the community perspective, the promotion of local participation in rural development policy-making processes has not been fulfilled. Diverse reasons and causes have progressively led to the social disaffection of the processes themselves, resulting in the loss of social and cultural capital, which is considered as the main asset of local development [10,11], and the overall control of the process [15]. Accordingly, there is an evident risk of conflicts as the consolidation of the external vision of the territory is opted for over the internal one [8].

As tourism enables diversification [12], it fosters the discourse of the heritage, tourism, and development correlation [12,18]. The milestones (FIM, LIPMP) have been fundamental for the development of supply and demand (quota). However, as shown by the data, the expectations generated by tourism have not been currently met [12,16]. Nonetheless, the favourable economic business trends, e.g., the generation of employment and income and increase in supply, as well as demographic trends, e.g., the slowing down of decline, can be observed. On the other hand, the adverse effects, such as the gentrification, overfrequentation, and marked seasonality, that compromise



sustainability have been identified [34,35]. Therefore, it is of crucial importance to determine and establish other activities to escape the theming caused by the specialisation.

In the context of the community participation [46,50], the improvements of the analysed processes are based on the comprehensive protection of the entire Mértola town, the development of planning processes, and a strategy that requires the participation of all stakeholders, public and private alike [49]. The establishment of limits through the perspective of carrying capacity and appropriate indicators will be necessary to achieve long-term sustainability [35]. Such planning becomes essential to avoid bottlenecks while aiming for an eventual declaration of the town as the World Heritage Site.

The limitations of the study mainly derived from the statistical series available, particularly after 1991, and the fact that primary information was not collected directly from the local population. On the other hand, the semi-structured interviews with the key stakeholders have provided extensive information and represented the pertaining views on the topic of this research.

Finally, the following research topics are proposed by the authors of this research, specifically, (a) in-depth studies of the relationships between economic, namely primary, secondary, and tertiary, activities and the impacts generated on them by the processes of heritage and tourism enhancement; (b) comparative studies of territories with similar characteristics to contextualise causes and consequences of the processes on local development; and c) analysis of issues related to employment, employability, gender issues, and quality of life of the local population in relation to heritage and its use in tourism processes. It is strongly considered that the future research on these themes could further contribute towards better understanding and more evidence-based analysis on the relation between tourism, heritagisation, and its values on sustainable local development.

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Article

# Sustainable Development of an Organic Agriculture Village to Explore the Influential Effect of Brand Equity from the Perspective of Landscape Resources

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**Abstract:** Luoshan Organic Agriculture Village was the first organic agriculture village in Taiwan, and it focuses on organic farming and cultivation. The village is developed through community empowerment and the utilization of existing tourism resources. In this study, tourists to the village were selected to participate in a survey. The findings indicated that country landscape resources scored the highest, followed by experience of organic farming and natural landscape resources. The results revealed that this travel destination enjoys high brand equity, with the factor of environmental sustainability scoring the highest, followed by the uniqueness of organic farming and the image of healthy tourism. This study suggested that landscape resources were positively correlated with brand equity; moreover, access to environmental information had a significant effect on the relationship between landscape resources and brand equity. Subsequently, the top three factors affecting landscape resources were identified—natural landscape resources, experience of organic farming, and experience of farm stays. In addition, the two factors influencing brand equity of quality and unique resources were derived. This study's results can help related organizations effectively establish landscape resources, thereby extending their brand equity and building the sustainable development competitiveness of tourist destinations.

**Keywords:** landscape; brand equity; organic agriculture

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## 1. Introduction

In recent times, rapid developments in technology have led to a prosperous society. Nevertheless, technology has had a negative effect on the environment through endangering natural ecosystems. Industrial development has caused environmental pollution. Furthermore, people who live in urban areas are inclined to desire a clean, pleasant, and comfortable environment in which to relax. Moreover, people's focus on environmental and economic factors has notably increased [1,2]. Additionally, an appreciable change has occurred in people's attitudes toward nature, healthy eating, and regiment [3]. To address the necessity of protecting the environment and maintaining ecological balance, the development of organic agriculture has become an attractive option.

In addition, the organic food market has rapidly expanded, and the demand for greener produce is increasing. Organic farming, agricultural products, villages, and agritourism have been presented as market opportunities for the organic market [1]. In 1996, Taiwan's government began promoting organic agriculture. According to statistics published by the Taiwan Organic Information Portal, a single plot of farmland has increased from 159.6 hectares to 8759.06 hectares [4], equaling an average annual increase of 19.97% hectares. Increasing awareness of eco-friendly behaviors, healthy lifestyles, sustainability, and slow movement indicates that the prospects of organic agriculture in Taiwan are brightening.



To promote organic farming, Taiwan's government spared no efforts in establishing the first organic agriculture village in 2002. This village, located in Hualien County's Luoshan Village, was aimed at promoting community development in various manners. From an economic perspective, a strong agricultural sector contributes to a strong economy; from a livelihood perspective, organic agriculture villages aim to enhance farmers' welfare; and from an ecological perspective, organic agriculture villages are not only set up to preserve pristine environments but also to improve the relationship between humans and nature. The International Federation of Organic Agriculture Movements proposed four principles, namely: health, ecology, fairness, and care [5]. These principles indicate that health is integral to living systems. Those involved in organic agriculture treat the health of soil, animals, people, and the planet as inseparable and seek to ensure fairness at all levels. Organic agriculture should protect and care for the health and well-being of the current generation as well as of the environment for the next generation.

Recently, with increases in people's income, the popularity of domestic travel within Taiwan has grown. From 2010 to 2018, the number of visitors increased from 191,302,739 to 281,151,830 [6]. In addition, according to a 2018 survey on Taiwanese tourism, 2.7% of Taiwanese tourists sought to enjoy ecological tourism, whereas 1.9% experienced rural tourism, which saw an increase of 46.15% compared with 1.3% in 2011. Therefore, farming and agricultural tourism has received increasing attention from people, indicating that organic agriculture village tourism is crucial and has prospects for development.

Landscape resources can be divided into entity and nonentity resources, natural landscapes and cultural landscapes [7], tangible landscapes and intangible landscapes, and resources with inherent meaning and resources with symbolic meanings. These divisions reflect the interaction between people and the environment, which is a dynamic system that changes with time and continues to develop [8,9]. Bastian et al. [10] indicated that the attraction of landscapes and nature is the most crucial reason for tourism, particularly in relation to experiencing nature and enjoying quietness and leisure time. Dai et al. [11] considered that, from a conventional landscape-resource perspective, tourists' perceptions of landscapes were lacking; tourists can value landscape resources only when they have a mindscape of landscape resources. Therefore, the landscape resources of a tourist destination are a critical type of tourism resource. Accordingly, crucial research topics for the development of tourist-consumption landscapes are: how to shape a landscape for tourist-consumption, establish a unique tourism product, build a unique attraction for a landscape based on tourists' perceptions and experience that landscape, as well as motivating tourists to recognize and rely on a tourist destination and product, and establishing the uniqueness and brand equity of a tourist destination.

In terms of marketing strategies, brand equity is an effective tool for enhancing competitive differentiation [12–14]. Establishing a unique tourism brand is a critical factor for sustainable development [15]. However, no systematic research has been conducted on the brand equity of tourist destinations [15,16]. Most studies on the brand equity of tourist destinations have focused on the assessment of brand equity [15], whereas few studies have explored the relationship between the landscape resources of tourist destinations and brand equity. Establishing landscape resources is a key factor for shaping unique brand equity.

Therefore, organic agritourism has become a critical market to be developed. This empirical study investigated tourists in Luoshan Organic Agriculture Village and revealed that landscape resources were positively correlated with brand equity. This study enables further understanding of the importance of brand equity dimensions and landscape resources, which can be referenced for the future brand equity development of organic agriculture villages.

## **2. Literature Review**

### *2.1. Landscape*

According to Oxford Dictionaries, a landscape is a picture representing an area of the countryside. Furthermore, landscape refers to natural terrain and topography. Sauer [7] indicated that the study of landscapes originated in Germany, where *landschaftskunde* means knowledge of land. Sauer, in his book *The Morphology of Landscape*, defined a landscape as the combined physical representation of both natural and cultural elements. He stated that a landscape is an organic unit on the Earth's surface where land and living beings are interconnected. Such a region has its own unique morphology, structure, and functions. In *Readings in Cultural Geography*, Wagner and Mikesell [17] defined the cultural landscape as follows:

The cultural landscape is a concrete and characteristic product of the complicated interplay between a given human community, embodying certain cultural preferences and potentials, and a particular set of natural circumstances. It is the heritage of many eras of natural evolution and of many generations of human effort.

Daniel and Cosgrove [18] suggested that a landscape is a cultural image, an illustrated method of representing, structuring, or symbolizing surroundings. Stamp [19] argued that a landscape represents the visible features of an area, including virtual and cultural dimensions. Moreover, landscape refers to the surface features of an area [20] and reflects the interactions between people and their living environment, as well as the outcome of a dynamic system that grows and evolves over time [8,9]. In addition, a landscape does not only involve how people view an area but also how they describe the place and experience its cultural elements [21]. In summary, landscape resources can be classified into physical and nonphysical resources, natural and artificial landscapes, tangible and nontangible landscapes, inherent and symbolic significance, as well as other symbolism. Additionally, landscape resources are considered a dynamic system that is growing and evolving.

Carneiro et al. [22] explored the relationship between rural landscapes and experience, conducting empirical analysis on tourists who visited two villages in Spain. The results showed that the visual experience of the tangible landscape is a crucial experiential source; moreover, sound, smell, taste, and contexts associated with the past formed a quiet and relaxing intangible environmental atmosphere, which was also a critical experiential source and could be used to shape the countryside and attract tourists. Utilizing natural landscapes and artificial facilities can further bolster a travel destination's unique brand equity. Various factors attract visitors to a travel destination. For example, in an organic agriculture village, tourists can enjoy the beauty of biodiversity, such as in fern ecological zones, mud volcanoes, and waterfalls [23]. Moreover, people living in urban areas tend to seek a clean, pleasant, and comfortable environment in which to relax [23,24]. Additionally, farm-based products and activities and the relaxing atmosphere of organic agritourism can provide unique travel experiences for tourists [23,24]. Farm life has the power to provoke feelings of nostalgia [23,24]. People feel nostalgic for farm life, which takes them on a mental journey to visit a memory from their past [23]. Furthermore, people's attitudes toward nature have changed considerably. Considering the necessity of protecting the environment and the importance of maintaining ecological integrity [25], staying in organic agriculture villages has become an attractive option for people living in urban areas [23]. Visitors like the idea of relaxing in an agriculture-oriented property and enjoying its daily lifestyle.

In summary, landscape resources form the core foundation of organic agriculture village development. The effective utilization of these resources is critical to the success of such developments. In this study, natural, country, and artificial landscapes, as well as people's experiences of farm stays and organic farming, were evaluated.

### *2.2. Brand Equity*

Branding is an effective method used by a company to differentiate its products from those of other companies. Moreover, it is a tool that an enterprise can use to strengthen its competitiveness. Through

endearing a particular product or service to customers, an enterprise ensures that the intrinsic value of that product or service will be acknowledged. That value can be considered brand value for customers [26]. A brand can be considered a physical or service product for customers. The ultimate goal of marketing is to establish a high level of brand equity. Marketers attempt to create positive and favorable brand images because such images can generate positive attitudes toward the brand [27–29].

In terms of marketing strategies, brand equity is an effective tool for increasing differential competitiveness [12–14]. It refers to the added value endowed on products and services [12,27,30,31]. A strong brand identity can lead consumers to make brand associations, which in turn creates brand equity [12]. Brand equity has been adopted in the hospitality industry in recent years [15,32–34].

Brand equity comprises five elements: brand loyalty, brand awareness, perceived quality, brand association, and proprietary brand assets. Aaker [12] indicated that brand equity is manifested through the associations that consumers make with a brand, whereas brand association is the result of brand recognition. Many studies have used four dimensions—awareness, image, quality, and loyalty—as the basis for measuring brand equity [16,29,35–42]. Zavattaro et al. [43] conducted a qualitative study to assess a method for managing local brand equity, and they used brand awareness, perceived quality, brand loyalty, and brand association to evaluate local brand equity. Tran et al. [44] conducted a study on the brand equity of tourist destinations and adopted brand loyalty, brand awareness, perceived quality, and brand image to assess brand equity.

In the present study, the following dimensions were used to measure the brand equity of Luoshan Organic Agriculture Village: (1) awareness, (2) the image of organic farming, (3) quality, (4) loyalty, and (5) unique resources. Quality is the perception that customers have of the product or service of a brand, and in this study it comprised travel services, comprehensive facilities, and tourists' experience of organic farming. Images of organic farming comprised environmental sustainability, images of healthy tourism, and feelings when traveling to rural areas. Unique resources relate to an excellent geographical location and uniqueness of organic farming.

### **3. Material and Methods**

#### *3.1. Framework*

All field crops require sunshine, air, water, and soil to grow. Climate change has an effect on the quality and quantity of food produced globally. Recently, food supply and food safety have been major topics in global public health. An increasing number of food-producing countries have promoted their food credentials to improve the competitiveness of their agricultural products [45].

Landscape resources are designed to attract admiration and appreciation. When a travel destination is appreciated by visitors as a unique attraction, its unique brand equity is strengthened [46,47]. Thode and Maskulka [48] asserted that consumers often rely upon a wine's place of origin when assessing its quality. Fernqvist and Ekelund [49] indicated that a brand's country of origin can influence consumers' perceptions of its products. Rajesh [50] examined the influence of tourists' perceptions of tourist environments (including the natural environment, historical and cultural environment, accessibility, facilities, relaxation, price, and value), which form their image of a destination in addition to satisfaction with and loyalty to it. Prayyag and Ryan [51] indicated that personal involvement influences destination image and place attachment, destination image influences satisfaction and place attachment, and place attachment influences satisfaction, which in turn influences revisit intention and appraisal. According to Dai et al. [11], from a conventional landscape-resource perspective, tourists' perceptions of landscape resources are not well understood. Tourists, through their mindscape of landscape resources, can value landscape resources. Various types of landscape resources (e.g., general, tourist-oriented, and popular-culture landscape resources) can help form city image through tourists' cultural experiences, thereby enhancing the city's authenticity, consistency, and popular culture as well as providing a reference for determining the positioning of an urban brand. The present study

selected a travel destination and focused on the relationship between its landscape resources and brand equity. Figure 1 illustrates the research framework. Based on the research framework, the following hypothesis was proposed:

**Hypothesis 1 (H1).** *Landscape resources do not positively affect brand equity.*

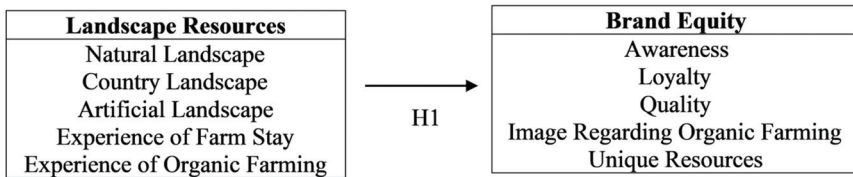


Figure 1. Research framework.

### 3.2. Questionnaire Design and Data Collection

Data were collected using a questionnaire survey administered to tourists in Luoshan Organic Agriculture Village. This questionnaire included three parts, namely the landscape resources of the travel destination, brand equity, and the respondents' background information. A 5-point Likert scale was adopted to measure participants' responses in relation to a group of categories in which people were asked to indicate how much they agreed or disagreed from least to most. In total, 258 of 258 questionnaires were completed by tourists to Luoshan Organic Agriculture Village for a valid response rate of 100%.

## 4. Results

### 4.1. Structural Analysis of the Sample

The results revealed that 55.6% of respondents were female, and the majority were married (51.4%). Furthermore, respondents aged 31–40 years accounted for 28.3% followed by those aged 21–30 years who accounted for 23.3%; notably, the majority of respondents fell into the 31–40 years age group. Furthermore, 27.2% of the respondents were students, followed by military officers, public servants, and educational personnel (22.2%). In terms of educational level, those with a bachelor's degree accounted for the largest proportion of the sample (49.4%). In addition, 35% of respondents earned less than NT \$20,000 per month, whereas 21.1% of respondents earned above NT \$60,001 per month.

### 4.2. Landscape Resources

Table 1 presents the results of the analysis of Luoshan Organic Agriculture Village's landscape resources, with average values between 3.80 and 4.67. Among these, organic farming ranked the highest, followed by fresh air and extensive views of the mountains. Luoshan Organic Agriculture Village was the first organic agriculture village in Taiwan; therefore, related agencies spent substantial amounts of money developing resources related to organic farming. Because the village is situated among the mountains and valleys of Eastern Hualien, its fresh air and extensive views of the mountains and other natural landscape resources have helped shape a natural and rural atmosphere. These resources are crucial factors that have attracted visitors to the village.

To determine the reliability of the scale, internal consistency was measured using Cronbach's alpha. The scale had five dimensions, namely natural landscape, country landscape, artificial landscape, experience of farm stays, and experience of organic farming, and they had Cronbach's alpha coefficients of 0.778, 0.845, 0.500, 0.794, and 0.703, respectively. Country landscape ranked the highest, followed by experience of organic farming and natural landscape. This indicated that the Luoshan Organic

Agriculture Village landscape resource scale had good internal consistency. Table 2 presents the results of the reliability analysis.

**Table 1.** Dimensions of Luoshan Organic Agriculture Village’s landscape resources.

Dimensions	Factors	Mean	Std. Deviation
Natural landscape	Luoshan waterfall	4.35	0.72
	Luoshan fish pond	4.08	0.77
	Luoshan mud volcano	4.50	0.59
	Fern ecological zone	4.34	0.75
Country landscape	Rural landscape	4.41	0.67
	Extensive views of the mountains	4.52	0.66
	Fresh air	4.65	0.56
Artificial landscape	Campsite	3.80	0.92
	Ancient mud houses	4.20	0.77
Experience of farm stay	Sampling of mud volcano bean curd	4.22	0.72
	Experience of farm stay	4.20	0.70
	Experience of rural living	4.28	0.66
Experience of organic farming	Experience of organic bread making	4.32	0.65
	Fragrant fried rice	4.04	0.73
	Organic farming	4.67	0.55

**Table 2.** Reliability analysis of Luoshan Organic Agriculture Village’s landscape resources.

Dimensions	Mean	Std. Deviation	Cronbach’s $\alpha$
Natural landscape	4.32	0.55	0.778
Country landscape	4.53	0.55	0.845
Artificial landscape	3.99	0.69	0.500
Experience of farm stay	4.23	0.59	0.794
Experience of organic farming	4.34	0.61	0.703

#### 4.3. Brand Equity

Table 3 presents the results of the analysis of Luoshan Organic Agriculture Village’s brand equity. Overall, Luoshan Organic Agriculture Village enjoyed a high level of brand equity, ranging between 4.36 and 4.72. Respondents indicated that the strongest brand equity factor was environmental sustainability, followed by the uniqueness of organic farming and image of healthy tourism. Tourists to Luoshan Organic Agriculture Village recognize the importance of environmental sustainability, the uniqueness of organic farming, and image of healthy tourism to brand equity.

**Table 3.** Dimensions of brand equity.

Dimensions	Factors	Mean	Std. Deviation
Awareness		4.36	0.76
Loyalty		4.36	0.71
Quality	Service Quality	4.52	0.66
	Comprehensive facilities	4.36	0.72
	Experience of organic farming	4.43	0.68
	Environmental sustainability	4.72	0.57
Image regarding organic farming	Image of healthy tourism	4.56	0.60
	Feelings of travelling to rural area	4.46	0.67
Unique resources	Excellent geographical location	4.21	0.80
	Uniqueness of organic farming	4.58	0.63

The brand equity scale had five dimensions, namely: awareness, loyalty, quality, image of organic farming, and unique resources, which had Cronbach’s alpha coefficients of 0.64, 0.84, and 0.50,

respectively. This indicated that the brand equity scale had good internal consistency, as shown in Table 4.

**Table 4.** Reliability analysis of brand equity.

Dimensions	Mean	Std. Deviation	Cronbach's $\alpha$
Awareness	4.36	0.76	-
Loyalty	4.36	0.71	-
Quality	4.44	0.52	0.64
Image regarding organic farming	4.58	0.54	0.84
Unique resources	4.40	0.56	0.50

#### 4.4. Cluster Analysis of Access to Environmental Information

This study employed cluster analysis to segment tourists to Luoshan Organic Agriculture Village based on the frequency with which they obtain environmental information and their frequency of visiting organic agriculture villages. This analysis divided the tourists into two clusters: those with low and high access to environmental information. Table 5 presents the results.

**Table 5.** Cluster analysis of access to environmental information.

Variables	Low-Access ( <i>n</i> = 106)	High-Access ( <i>n</i> = 149)	F	Significance
Frequency of getting information	3.00	4.46	222.076	0.000
Frequency of visiting organic agriculture village	1.23	2.93	174.238	0.000

#### 4.5. Relationships among Landscape Resources and Brand Equity

To confirm whether access to environmental information moderated landscape resources and brand equity in Luoshan Organic Agriculture Village, this research classified the tourists into those with a low level of access to environmental information (i.e., the low-level cluster) and those with a high level of access to environmental information (i.e., the high-level cluster) before establishing a linear structural relationship model. The model was analyzed using the structural equation model analysis software package LISREL 8.52, and the results are presented in Figure 2. The numbers represent path coefficients, whereas those in brackets represent the *t* values of the coefficients.

In the low-level cluster, under the absolute fit measures, the goodness-of-fit index (GFI) was 0.93 and the root mean square error of approximation (RMSEA) was 0.04; every measure was at a significant level. Among the incremental fit measures, the adjusted GFI (AGFI) was 0.98, the normed fit index (NFI) was 0.97, and the comparative fit index (CFI) was 1.00; all values fell within the ideal range. Among the parsimonious fit measures, the root mean square residual (RMR) was 0.05. The path coefficient of landscape resources to brand equity was 0.65, and *t*-value was 5.38, reaching the significance level. These results falsify H1. The top two factors affecting landscape resources were experience of organic farming and natural landscape. In addition, two factors that influenced brand equity were derived: quality and unique resources.

In the high-level cluster, under the absolute fit measures, the GFI was 0.94 and the RMSEA was 0.07. Among the incremental fit measures, the AGFI was 0.89, the NFI was 0.94, and the CFI was 0.97; all values fell within the ideal range. Furthermore, the RMR was 0.05 among the parsimonious fit measures. The path coefficient of landscape resources to brand equity was 0.76 with a *t*-value of 5.18, reaching the level of significance. These results also suggest that landscape resources positively affect brand equity. The low- and high-level clusters were proven to be moderators; Figures 2 and 3 show their moderating effects on the relationship between landscape resources and brand equity. For the high-level cluster, the moderating effect reached 0.76, while the moderating effect of the low-level cluster was 0.65; the moderating effect of the high-level cluster is greater than that of the low-level cluster. The results revealed that the impact of landscape resources on brand equity varies with different levels of access

to environmental information moderating the relationship between the two factors. Consequently, the level of access to environmental information is a moderator that influences the relationship between landscape resources and brand equity.

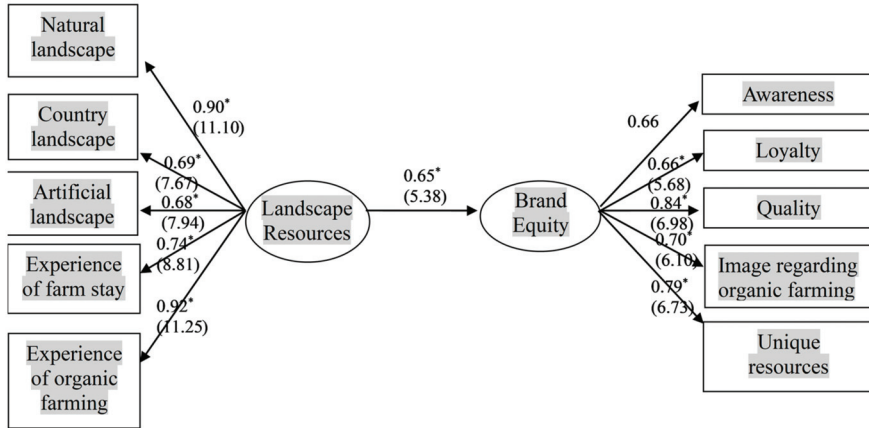


Figure 2. Relationships among landscape resources and brand equity in the group with a low level of access to environmental information.

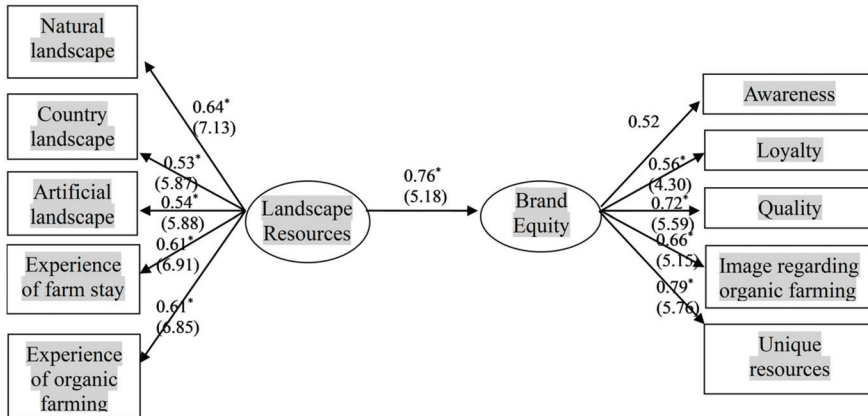


Figure 3. Relationships among landscape resources and brand equity in the group with a high level of access to environmental information.

### 5. Discussion and Conclusions

Brand equity is a crucial factor for differentiation. It is an effective method used by companies to differentiate their products from those of other companies. Furthermore, brand equity is a tool that an enterprise can use to strengthen its competitiveness through utilizing the landscape resources of a travel destination. The findings of this study indicated a high canonical correlation between landscape resources and brand equity. The results also indicated that Luoshan Organic Agriculture Village enjoys high brand equity, especially in terms of its environmental sustainability, uniqueness of organic farming, and image of healthy tourism. Consumers’ perceptions of landscape resources help produce meaning and image, thereby forming a meaningful consumption landscape and further influencing brand equity, as well as indicating the importance of the consumption landscape. Regarding organic

agricultural tourism, tangible landscape resources such as natural field scenery and organic agricultural experience and environment make tourists feel natural, healthy, and relaxed. This occurs through them participating in activities, experiencing the countryside lifestyle, and understanding the consumption meaning and value of an organic, nontoxic, sustainable environment, thereby further shaping the brand equity of organic agricultural tourism. Therefore, tourists' understanding of the importance of organic agricultural development is conducive to environmental sustainability.

In addition, access to environmental information had a significant moderating effect on the relationship between landscape resources and brand equity. To analyze how access to environmental information influences landscape resources and brand equity in Luoshan Organic Agriculture Village, a linear structural relationship was created in this study using the structural equation model analysis software package LISREL. The research results showed that with the moderation of high-level access to environmental information, the path coefficient of landscape resources to brand equity was 0.76, which is greater than the corresponding coefficient with the moderation of low-level access to environmental information (i.e., 0.65). This suggests that landscape resources have a stronger impact on brand equity in the context of high-level access to environmental information compared with the impact of the moderation of low-level access to environmental information. Thus, access to environmental information has a moderating effect on the relationship between landscape resources and brand equity. The top three factors affecting landscape resources were the natural landscape, experience of organic farming, and experience of farm stays. In addition, two factors were derived that influenced brand equity: quality and unique resources.

Maximizing local economic benefit is also one of its goals for Ecotourism [52]. If the local people of Luoshan Organic Agriculture Village do not benefit from ecotourism development, they will not attach importance to protecting and developing organic agriculture tourism in the long term. In some cases, tourism has positive influences for conservation, particularly in well-managed protected areas, in terms of helping local citizens to generate their revenue via tourism [53–56]. Only when the protection of natural resources and the development of tourism are both implemented effectively can Organic Agriculture tourism be successful and sustainable.

Establishing the brand image of an organic agricultural environment can motivate tourists to recognize the importance of organic environments and inspire emotional connection with them. Hualien and Taitung have been called 'Taiwan's backyard' and are considered pure land in Taiwan. We suggest that organic agriculture in Hualien and Taitung is integrated with surrounding natural and cultural resources to shape the brand image of organic agriculture and environmental sustainability, and to help tourists better understand agricultural and rural tourism. This will enhance tourists' identification with environmental brands and the brand equity of organic agricultural tourism.

Because Luoshan Organic Agriculture Village was the first organic agriculture village in Taiwan, organic farming and related experiential activities were the core landscape resources for shaping the village's brand equity. Luoshan is located in the center of the East Rift Valley; with the rich natural resources of the area, such as mud volcanoes and waterfalls, ample potential exists for establishing brand equity in Luoshan Organic Agriculture Village. Further integrating tourism activities with organic farming will create greater economic value—this could be a critical development strategy for establishing a unique image for Luoshan Organic Agriculture Village.

## **6. Restrictions**

Through an analysis that utilized linear structural equation modeling, it was revealed that the landscape resources of tourist destinations are a factor that affects brand equity, and that the level of access to environmental information is a moderator for the relationship between landscape resources and brand equity. In light of this study's research limitations, five suggestions are proposed for subsequent research. This study assumes that the relationship between landscape resources and brand equity is linear. Further research is needed to confirm whether the landscape resources of other organic agriculture villages also have a linear relationship with brand equity. Cluster analysis was conducted



using level of access to environmental information as a variable (which constituted the analytical basis for the moderating effect of access to environmental information); however, cluster analysis can reduce intra-group variation, and whether this affects the analytical results is an issue that requires further clarification. This study mainly examined tangible landscape resources. Future research can include intangible resources or further analyze landscape resources from the perspective of consumption. In this study, an empirical analysis was conducted with tourists of the Luoshan organic village in Taiwan serving as research participants, and whether the research results are applicable to other organic agriculture villages is an issue that requires further clarification. Due to the geographical location of Luoshan organic village, the results of this study highlight the importance of unique resources. In this area, the issues worth studying include the kind of unique resources that other organic agriculture villages possess and whether landscape resources are also important factors that affect the brand equity of these villages.

**Author Contributions:** Conceptualization, Idea come from C.-C.S. and D.-J.L.; methodology, C.-C.S. has discussed with Y.-R.C. and D.-J.L.; software and validation by Y.-R.C. and C.-C.S. check it again; formal analysis, Y.-R.C.; investigation, Questionnaires Survey in support by D.-J.L.; resources, D.-J.L.; data curation, C.-C.S.; writing—original draft preparation, Y.-R.C.; writing—review and editing, C.-C.S.; visualization, C.-C.S.; supervision, C.-C.S.; project administration, C.-C.S. and Y.-R.C. All authors have read and agreed to the published version of the manuscript.

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Article

# Filmic Gendered Discourses in Rural Contexts: The Case of the Camino de Santiago (Spain)

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**Abstract:** Rural areas have turned into multifunctional areas. They satisfy different economic and social requirements; among these, they are consolidating their position as film production locations. Becoming a film location ensures visibility and provides new forms to access sustainable economic trajectories to promoting rural areas and rural vitality. In some cases, filmic discourses present unequal gender treatment that may be associated with their locations. Considering this, the aim of this research was to explore cinematic discourses based on the symmetry or asymmetry in gendered cinematic representations that mainly occur in the rural space of the Camino de Santiago (Spain). This First European Cultural route crosses urban and rural centers that have benefited in different ways from its international recognition. By combining both the linguistic and visual codes, I engaged in a qualitative film discourse analysis concerning female pilgrims along the route. Despite of the feminization of the Camino, the results prove the permanence of gendered norms and societal roles in audio-visual productions based on a common latent ideology. The conclusions introduce the concept of social and relational sustainability as a way to achieve equal gender treatment when creating media discourses.

**Keywords:** cinema; filmic discourses; rural areas; landscapes; gendered interpretation; territorial identity; Camino de Santiago; sustainability

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## 1. Introduction

Creative and cultural media are common communicational tools conveying social and cultural messages; their content is diverse and affects the perceptions of their targets, contributing to the production of gendered cultural identities [1–3]. Among them, the focus of this study was movies, which are assumed to be cultural documents and social sources of information, whose spaces can be unconsciously elaborated [4,5]. The audiovisual industry has become increasingly interested in cultural routes because their landscapes provide authentic locations for film productions that, as a result, share territorial, visual, and textual discourses [6]. The cinema serves as a form of promotion and can lead to local development due to all the associated activities [7]. In this context, rural areas are unique scenarios for cinema, providing an opportunity to enhance their territorial identity due to its popularity. Therefore, film-induced tourism can play a pivotal role in promoting endogenous local economic awakening of selected rural areas [7,8]. For rural communities, becoming a film location can be a method of reinterpreting their vitality; due to the positive impacts of this growing creative industry, these locations may plan new sustainable economic trajectories by participating in an innovative and collaborative development model. The cultural and creative audiovisual industries satisfy different aims, as they can contribute to promoting the values of the territory identity elements; all of them ensure visibility while contributing to the construction of attractive and unique tourist rural spaces [9,10]. For this growing importance, the present research draws attention to the production of filmic discourses, both textual and visual, associated with the rural context of the Camino de Santiago (Spain) (henceforth the expression used will be the Camino).

The Camino is the First European Cultural route, and one of the most important pilgrimage routes in the world. Its origin dates back to the 9th century, and follows the discovery of the remains of the body of the Apostle St. James, an event known as the *inventio* (that is the discovery of the relics of a martyr in a place where there is no previous tradition of their existence), and their official recognition in the 12th century [11]. The Camino is used to refer to a network of routes walked or ridden by a large number of pilgrims to travel to a small city in the north of Spain: Santiago de Compostela. These routes would bring thousands of people from all over Europe; that is why the Camino played an important role in the construction of Western European culture during the Middle Ages; as Goethe once stated, “Europe was made on the pilgrim road to Santiago de Compostela”. A major pilgrimage movement emerged, reaching its heyday in the 12th and 13th centuries [12]. After many years of intense pilgrimage movements, in the 15th century, the number of pilgrims walking the routes to Santiago de Compostela started to decrease, and the pilgrimage to St. James entered into a continuous decline, which lasted until the 19th century [13]. The urban historical center of Santiago and some routes of the Camino have been appointed as UNESCO World Heritage Sites (WHS). In 1993, the French route was first declared a WHS; then in 2015, the northern routes (consisting of four routes: the Original Camino, the Coastal Camino, the Basque Country-Rioja Inland Camino, and the Liébiana route) received the same international accolade. Since 1993, the Camino has been strongly promoted by the regional government. This process of recovery was conceived as a path to the socio-economic enhancement of the rural space [14]. Many of the actions aimed at conditioning the rural areas of the Camino were financed by the Structural European Funds LEADER I and II (the French acronym stands for: “liaison entre actions de développement de l’économie rurale”, in English it means: links between the rural economy and development actions) and PRODER (Operational Programme of Development and Economic and Economic Diversification of Rural Areas) [15,16]. Since then, the Camino pilgrimage space has assumed a tourist function [17]. The necessary services, infrastructure, and equipment (for instance, hotels and public hostels) have been constructed and provided along the route [18,19]. In the following passage, Rubén Lois González and Xosé Santos Solla [20] summarize the main changes occurring along the route: “old paths and walkways have been repaired, bridges have been rebuilt, water sources have been purified, ancient monuments and populations have been regenerated and repopulated, native trees have been planted and signs have been placed in a set of repeated cultural or pilgrimage itineraries” (p. 5). Indeed, the 1993 Holy Year (the Holy Jacobean Year is essentially a Jubilee year, which only covers the city of Santiago de Compostela. It is also called Jacobean Years and is celebrated every 6, 5, 6, and 11 years when the feast of Saint James on the 25th of July falls on a Sunday) marked the conversion of both Santiago and the Camino into major Spanish and international tourist destinations [14,18]. This *Plan Xacobeo 93* led to the take-off of the tradition of pilgrimages to Santiago, assumed as the most well-known brand in Galicia and easy to sell on the European and world markets. Since that year, the Holy Years have turned Santiago and the Camino into two of Spain’s most popular tourist destinations [12,19]. As a consequence, the growth in the number of pilgrims arriving to Santiago has been continuous, from 99,436 in 1993 to 347,578 in 2019 [21]. This is due to the fact that the city of Santiago and the Camino have turned into a polysemic space in reference to the plurality of meanings, functions, and motivations that nourish these spaces [17,21,22]. Motivation is one of the fundamental elements of the Jacobean pilgrimage [12]. Nowadays, the most common spiritual motivation is embodied in items such as “health”, “religious motivation” or “pilgrimage”, so the Camino is a sort of therapeutic route [23], as the movies will show. In fact, as in reality, the characters will do it for a “keen realization of personal wounds or missing elements in one’s everyday life. Divorce, death, losing one’s job, alienation from one’s body, work, self or society are often the reasons for these wounds or lacks. The second element consists in experiences of renewal or transformation. Therapy as it is experienced on The Way is very often a gradual process in which you open up to the suffering in your soul while you move” [24] (p. 267). The Camino clearly offers experiences related to emotions, and perceived spirituality is linked to the visited environment, as well as to the emotional processes experienced during the journey.

Until now, few studies have explored the relationship between the Camino and cinema [25–29], and none has investigated this issue in gendered terms. Their interest mainly focused on considering cinema as a touristic resource that is able to project a local image onto an international scale. However, with this research, I aimed to examine movies as sources of information providing patterns about social and cultural behaviors so as to renew the dialogue between cinematic production and gendered roles along the pilgrimage route, which is mainly characterized by rural areas. As gender analysis in tourism can focus on one or both sexes to explore the social construction of roles and behaviors [30–32], the research aimed to reveal the way in which behaviors and roles respond to social constructions of gender. The aim of this study was to reconstruct a cinematic discourse based on the symmetry or asymmetry in gender cinematic representations that mainly occur in the rural space of the Camino. The paper is structured into four sections. Section 2 provides a brief literature review concerning the key theoretical pillars of the paper: cinema and gender. Since film language is complex, this paper proposes one of the possible movie interpretations that works as an interpretative hypothesis of the work [33]. To this purpose, Section 3 presents the qualitative approach that was used to highlight the cultural and ideological components and the social relations. Section 4 presents the resulting interpretative activity that supports the existence of a latent ideological framework that might be associated with this space, producing impacts and effects on a target public, which is becoming increasingly interested in productions related to the Camino. The findings highlight the concept of social and relational sustainability as a way to achieve equal gender treatment when creating media discourses, as pointed out in the final Section 5.

## **2. Literature Review**

According to Bernard Lane [34], rural tourism includes “farm-based holiday but also comprises special-interest nature holidays and ecotourism, walking, climbing and riding holidays, adventure, sport and health tourism, hunting and angling, educational travel, arts and heritage tourism, and in some areas, ethnic tourism” (p. 9). In addition, rural tourism deals with the recovery of traditional architectural heritage, the management of natural and cultural resources, and the involvement of the local population in tourism development, and is motivated by the pursuits of tourist attractions associated with relaxation, countryside, traditional culture, and escape from everyday life [35,36]. Thus, considering these multiple activities and motivations, walking the pilgrimage route can be considered an alternative form of rural tourism; apart from the pilgrimage infrastructure, pilgrims use rural tourist facilities. Pilgrims spend a good part of their time walking through different rural landscapes. Both pilgrimage and rural tourism are aimed at increasing the positive social, economic, and environmental impacts of tourism [37]. Due to the rich natural and cultural heritage that can enhance territorial identity and create an attractive brand for the territorial competitiveness [38], Camino rural landscapes are ideal locations for narrations of personal problems and concerns, feelings and emotions, and hopes and expectations. Given these premises, the present section provides a brief review of the key theoretical pillars of the paper: cinema and gender. This choice is justified because the cinematic sources are used here as the main research material, and gender is the interpretative theorem of the selected sources.

### *2.1. Cinema*

When talking about cinematic languages and productions, different positions and schools of thinking can be traced. George Friedmann and Edgar Morin [39] stated that all movies must be considered as keys to understanding and accessing the dark spaces of society. The cinema is co-created together with its public through the production of images, which might be assumed to be forms of knowledge of reality. A movie undergoes different interpretations that result from constraints defining the register and the genre of the critic, and thus of its public. Spectators are an important part of the meaning-making process of a movie, as they are part of this act of communication. Originally, according to the French film theorist Christian Metz [40], the founder of film semiology, films cannot be

regarded as comprising a language composed of strict grammar and syntax like the written or spoken word. In C. Metz's opinion [40], a film's basic unit is the shot, which is neither symbolic nor arbitrary but iconic; therefore, it is laden with specific meaning. Considering this, a movie is a language that involves a large number of signifying organizations that are linked to perception, imagination, social, intellectual, and ideological position. In his theoretical model, known as the "grande syntagmatique", C. Metz [40] argued that individual cinematic texts construct their own meaning systems rather than sharing a unified grammar.

According to the German film theorist Siegfried Kracauer [41], cinema is unique as it establishes a permanent tension between reality and creation. Even the most artificial movie creation expresses a certain epoch and a certain culture. For this reason, he stated that cinema is a documentary that reflects the status of the real world. Conversely, the French philosopher Edgar Morin [42] believed that the movie is not a direct reflection of the social world; rather, it is an object to analyze in itself, between the everyday and fantastic world, truth and illusion. Thus, it is an object with a double nature, both real and imagined. Cinema presents institutional and sociological issues, but also acts as an institution of social imaginary. E. Morin [42] stated that one of the main aspects of cinema is the public, which reminds us that the cinema is a social engine aimed at cultural consumption. A further position about the degree of realism within cinema is that of the French film critic Pierre Sorlin [43], who argued that cinema is a translation of reality that works on the basis of a levy operated on the world, which is enabled by the tools and techniques of each movie. In other words, he stated that cinema is a translation of the real world that acts like a repertory and producer of images that projects that fragment of reality accepted and recognized by its public [44].

Considering these different positions, cinematic productions narrate stories and describe places and locations, lifestyles, customs, and practices. In other words, they participate in the creation of a territorial discourse that might seduce millions of spectators and contribute to the diffusion of different social habits and behaviors, apart from being a tool for promoting natural and cultural environments. Due to their communitive function, movies facilitate the diffusion of cultures and create an image of a destination [8,27]. As such, they produce a visibility, reinforcing the territorial soul and uniqueness and increasing international popularity [36–39]. Cinematic images can reproduce emotional journeys (experiences, vision of places, and scenic beauties), thus affecting the decision to undertake a trip [45–51]. Due to this enhancement of human and spatial relationships, cinematic productions can disclose affective aspects of the places, creating geography of experience and even imaginary geographies [52,53].

Among the emerging factors relating the cinema with the rural area is the rural landscape perception. Since the end of the 20th century, the perception of rural areas as part of the open spatial system has grown [54], and cinema is one of the industries that are incorporating this trend due to its visual and scenic properties. Perception and interpretation come together in the domain of visual ideology and the spectacularization of life in Western culture, with the eye as the only means to acquire knowledge [55,56]. It is possible to distinguish between an outsider and an inner cinematic landscape. In the first case, the cinematic landscape represents the territorial richness and the magic atmosphere of faraway places; in the second case, it refers to an experience based on the relationships between characters and space [57,58]. All of these elements result in the soft sale of the territory generated by movies. Due to the different techniques, movies appeal both to rational and to emotional elements; these elements interact to produce a representation of cinematic landscapes subjectively organized depending on cultural additions [59]. In terms of the case study, cultural itineraries mirror the territorial wealth of film productions, which are favored by the use of dynamic images.

## 2.2. Brief Review of Gendered Issues

After the psychoanalytic hypothesis of Robert Stoller in 1968 [60], *gender studies* was a concept elaborated by Ann Oakley in 1972 [61]. Sex is a social category; men and women are social groups. With the term *genre*, Risa Whitson [3] defined it as "one of the primary ways in which our society

produces and naturalizes differences” (p. 49); therefore, it is relevant for understanding culture. Gender studies are a way of approaching women and men as inseparable parts of a functioning system. They are based on a relational approach to sexes, according to which the features ascribed to each genre are socially founded on a relationship of opposition and complementarity [62]. Early studies of women and geography addressed differences between men and women in terms of work, pay, and societal roles [63]. Gender relations are constitutive of the spaces because our presence and behaviors within is gendered-determined, and spaces assist power relations that are traditionally constructed according to a masculine and heteronormative scheme [64]. From the point of view of the feminist geography, places are not harmonious, fixed, and static; rather, they are dynamic, socially constructed, fluid, and porous. Thus, spaces are generally considered “locations” where social and spatial relations occur, with interactions between them to produce a certain interpretation [65]. In some spaces, the patriarchal norms are more evident [65]. In *Theorizing Patriarchy*, Sylvia Walby [66] identified six structures through which women are dominated: households, waged work, the State, violence, sexuality, and cultural institutions (the media). As far as this last aspect is concerned, in the past, the cinema has been a “place” of research for the relationships between men and women, relatives and children [67]. Molly Haskell [68] showed that cinematic productions convey a certain kind of female representation evolving throughout time. In her opinion, the cinema naturally serves a singular ideology that tends to maintain the superiority of the male status; thus, spaces can be gendered through images that stress the women’s subordinate status and reinforce masculinity [69]. This evokes the role of the male gaze; Laura Mulvey [70] stated that: “in a world ordered by sexual imbalance, pleasure in looking has been split between active/male and passive/female. The determining male gaze projects its phantasy on to the female form which is styled accordingly. In their traditional exhibitionist role women are simultaneously looked at and displayed, with their appearance coded for strong visual and erotic impact so that they can be said to connote to-be-looked-at-ness” (p. 19). She properly referred to how Hollywood narrative films used women to provide a pleasurable visual experience for men. This concept is related of Judith Butler’s [71] notions of performative gender definition.

Following the so called “critical turn”, tourism studies started to be interested in the analysis of the political and social dimensions of tourism, including the study of gender relations [72,73]. According to Karla Henderson [30,31], there are five stages defining the evolution of gender analysis in leisure studies that Margaret Swain [32] reinterpreted as follows: (1) invisible (without women); (2) compensatory (“add women and stir”); (3) dichotomous differences (sexual differences); (4) feminist perspective (focused on women); and (5) gender-aware frameworks (analysis of gender relations, roles and stereotypes that situate women in a subordinate position with regards to men). The progressive spatial feminization is changing other spaces into being woman-accessible. This is what can be appreciated in the case study. According to the statistical series published by the Cathedral of Santiago de Compostela, presenting the number of pilgrims collecting the *Compostela* (a certificate stating the completion of the pilgrimage having covered at least 100 km on foot or 200 km by bike or on horseback) at the Pilgrim’s Reception Office in the Diocese of Santiago, there has been a general increase in the percentage of women pilgrims, as shown in Figure 1. The questionnaires by the Cathedral of Santiago and the resulting reports that, before the interruption of the activity due to the COVID-19, were regularly published on the webpage, provide different kinds of information, but the one regarding the pilgrims’ sex was selected to point out a patterned increase in the female presences. Since data collection began in 2004, the percentage of female pilgrims had always been around 40%. The only peaks occurred in 2004 and 2010, coinciding with the Holy Years. Since the last Holy Year 2010, the number of women heading to Santiago soared. Between 2011 and 2019, female participation increased by nine points and went from 42% to more than 51%. This is interesting and relevant information, as it confirms a sort of feminization of the Camino, far from the past historical stereotypes according to which pilgrimages were undertaken by men [74,75]. This empowerment of the female pilgrims is irregular throughout the year. In winter the number of men is double that of women, and this might be due the fact that the most crowded months are perceived as the safer ones. In addition, these different



behaviors might confirm what M. Swain [32] stated. In her opinion, women are involved differently from men in their consumption of tourism. However, at the present there is no study investigating this current trend, which might be due to different factors. Firstly, the post-contemporary space of the Camino is a “safe space”, thus female pilgrims can walk alone. Secondly, the Camino welcomes people from different ages and cultures; it is an inclusive space, and thus it is also adequate for female pilgrims. Thirdly, and no less important, there is a democratization and equal access to cultural spaces, as the one of the Camino. These factors enhance the female participation in the pilgrimage, as, for instance, the same increasing female literary production of travel diaries is proving.

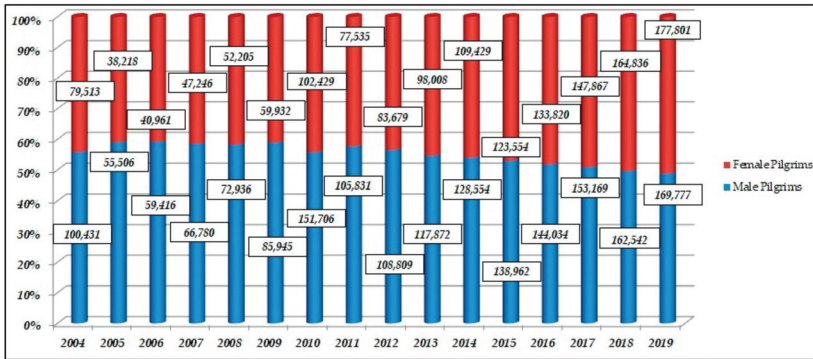


Figure 1. Pilgrims arriving at Santiago and collecting their Compostela according to their sex. Sources: pilgrims’ reception Office (2004–2019).

3. Materials and Methods

Table 1 presents the main details of the selected movies: year and country of production, director, duration, the reason for doing the Camino, and the starting point. Concerning the motivation, the movies show post-contemporary pilgrims’ motivations, as they point out the importance of living a unique experience with therapeutic effects, while enjoying landscape and environment, heritage and social relations [20,23,24]. These primary sources were selected according to the following criteria: (1) their location is basically the rural space of the Camino; (2) producers come from different countries: *Saint Jacques ... La Mecque* (France, C. Serreau, 2005), *Al Final del Camino* (Spain, R. Santiago, 2009), *The Way* (USA, Spain, E. Estévez, 2010), and *Onde Está a Felicidade?* (Brasil, Spain, C.A. Riccelli, 2011); and (3) they represent two different filmic genres: two comedies and two tragicomedies (thus determining different filmic discourses).

Table 1. The sources of the research.

Movie Details	<i>Saint Jacques ... La Mecque</i>	<i>Al Final del Camino</i>	<i>The Way</i>	<i>Onde Está a Felicidade?</i>
Year	2005	2009	2010	2011
Country	France	Spain	USA, Spain	Brazil, Spain
Director	Coline Serreau	R. Santiago	Emilio Estévez	C.A. Riccelli
Duration	1:45	1:37	1:22	1:42

Table 1. Cont.

Movie Details	Saint Jacques ... La Mecque	Al Final del Camino	The Way	Onde Está a Felicidade?
Reasons	Get inheritance; social experience; personal (personal thanksgiving)	Magazine report; solve couple crisis	Personal (son's death; work crisis; search for new life); sport	Personal (search for new life); produce a reality show
Starting point	Puy-en Velay	Galicia	Roncesvalles	Roncesvalles
Male protagonist (s)	5	1	2	2
Female protagonist (s)	4	1	-	1
Male relevant characters	-	6	2	-
Other male characters	5	3	28	37
Female relevant characters	-	4	1	1
Other female characters	18	2	11	37
Genre	Tragicomedy	Comedy	Tragicomedy	Comedy
	Saint Jacques ... La Mecque	Al final del Camino	The Way	Onde Está a Felicidade?

Source: own elaboration.

As each film's analysis was based on a filmic theorem, the interpretive act consists of setting a hypothesis and an interpretative work [76,77]. The interpretive theorem was the use of gendered stereotypes that (consciously or not) appear in the cinematic productions regarding the case study, whereas the interpretative work relied upon an inclusive multi-layered approach to obtain a critical understanding of power relations and social identities [76]. This interpretive procedure allows the identification and discovery of the potential of visive language when investigating knowledge and theories behind the camera. Thus, cinematographic images were compared to qualitative and social indexes that allowed the consideration of three components: (1) content—the plots are choices indicating the preferences of society; (2) style—the technical choices correspond to aesthetic selections; and (3) how to act in society—testimonies of social processes and dynamics [78,79]. Filmic decoding is aimed at drawing attention to the social and cultural aspects that are set together to characterize female pilgrims and their relations.

Upon these premises, this aim is achieved using a combined methodology based on the linguistic and visual analysis.

- Linguistic code: it shapes language and sexual identities as it plays an important role in the transmission of masculinity and femininity. Dinka Acevedo and Luz Gil-Salom [1] applied the methodology proposed by Theo Van Leeuwen [80] about social actors' representation to decipher how gender social conception is constructed by media influence (Appendix A). The roles of social actors play a significant part in the work of many critical linguists [80–85]. Since it is important to reflect on their roles in the cinema, the categories proposed by T. Van Leeuwen [80] in a critical analysis of racist discourse were selected to evaluate the cinematic critical discourse analyses. This approach is considered viable as the categories enable the identification of cultural and ideological ideas that structure the cinematic discourse set in rural space.
- Visual Code: Film is a narrative medium and an art based on language whose vocabulary is the simple photographed image [86]. Image is one of the most ancient and rich means of communication, whose reading must be considered an active rather than a passive exercise. For this reason, the analysis introduces meaningful images easily decoded by the public. Each visual analysis has its own methodology depending on the aims and the interests of the project [79]. Its immediate value is an ally for the dissemination and learning of customs and habits. For this reason, visual analysis was performed by introducing a selection of moviescapes representing female pilgrims in rural contexts.

The preferences for these codes are justified by the intention to consider the most common and easily recognizable discourses related to cinematic production. Language and image are opposite and complementary codes, as language participates in the production of the visual content, reinforcing its message [79]. As stated by T. Van Leeuwen [80], “words provide the facts, the explanations, and the things that need to be said in so many words” (p. 136). They show until which point images can furnish imagination.

From an operational point of view, once the interpretative theorem was set and the sources selected, movies were watched using a media player reproducer, which made it possible to interrupt the projection when necessary to analyze the visual and linguistic content. Due to the multi-layered approach, movies were viewed several times. The first viewing was mainly conducted to understand the plot and to confirm the coherence of the selection of the sources; the views were repeated to “quantify” the information represented in the interpretative tables about the societal role associated with female pilgrims. Therefore, the number of projections changed according to the movies, as some needed more attentive analysis. This quantitative exercise necessitated counting, so a checking session was undertaken. The last projection was conducted to select moviescapes that satisfied the interpretative hypothesis of the research. This selection is introduced in the following section.

#### 4. Results

This section is structured into four subsections, one for each movie. Each section presents the plot and the cinematic discourse analysis based on a selection of categories indicated by T. Van Leeuwen [80] and explained in Appendix A. Tables 2–5 and A1 refer to the cinematic discourse analysis of each movie according to T. Van Leeuwen [80] and present two main different social conditions: exclusion and inclusion. In the case of exclusion, only one technique is indicated; in the case of inclusion, a set of possible techniques conveys a different form of participation in the plot. To achieve this level of participation and involvement, attention was paid to reveal a different form of consideration. Here, the structuring of the cinematic discourse can be appreciated and evaluated. The quantitative information introduced in the table refers to those actors who are reproduced in the foreground (actors in panoramic and big collective scenes were not counted).

##### 4.1. Movie 1: *Saint Jacques ... La Mecque*

In *Saint Jacques ... La Mecque*, the pilgrims’ group is formed by nine pilgrims: the male guide and four male and four female pilgrims. They represent the French society through their different social statuses and religious professions. Clara is a teacher, who is obliged to walk the Camino with her two brothers (Pierre and Claude) to receive the inheritance from their mother, who faked her death in order to convince her children to go on the pilgrimage.

Following the Van Leeuwen [80] methodology, the social actors’ representations can be classified as shown (Table 2):

- **Backgrounding:** Two out of four background female characters are influential: Clara’s mother and Ramzi’s mother. They determine much of the action. The former fakes her death to convince her children to undertake the pilgrimage and thus spend some days together; the latter paid for Ramzi’s pilgrimage (supposedly to Mecca) because she wanted him to learn to read.
- **Activation:** The active social actors are mainly male characters, namely the guide, Pierre, Pierre’s driver, and the notary. The active female social actor is Clara, who also works during her pilgrimage.
- **Genericization:** Social actors can be represented using generic references (classes). This classification occurs through individualization (spectators are informed about pilgrims’ personal lives), aggregation (three male pilgrims), and collectivization (which refers to the group).
- **Nomination:** This mainly refers to the nine members of the group (who also undergo a process of collectivization) and their relatives.

- Categorization: The three male characters are generally represented as priests, thus forming a category. Female categories are four nuns, three hosts, and six pilgrim officers.
- Functionalization: The male functionalized characters are the guide (throughout the film) and Pierre (who makes constant references to his managerial responsibilities). Both roles allude to a sort of sense of leadership (in the group and in the society). Clara teaches Ramzi to read.
- Identification: This process occurs through classification and relational identification. In the case of classification, the first criterion of classification is age. There is an equal distribution among the pilgrims: four men and four women, two adult men and two adult women, and two young men and two young women, although the guide is an adult man. A second identification is the religious belonging. Two boys are Muslim, three male social actors are Christians, and six women are Christian as they are nuns. Concerning class belonging, Pierre and Camille represent a rich social class. Claude is a poor alcoholic and Ramzi and Said are quite poor. Since the beginning, the filmic text is characterized by a relational identification. Pierre, Claude, and Clara are siblings. Then, there are Pierre’s wife, Claude’s wife and daughter, and Clara’s husband, son, and daughter. The background female social actors are the brothers’ mother and Ramzi’s mother, as well as Camille’s mother and the guide’s wife.

**Table 2.** Cinematic discourse analysis of *Saint Jacques . . . La Mecque* according to Van Leeuwen [80].

		Female Characters	Male Characters	
Exclusion	Background	4	2	
	Activation	1	4	
	Passivation	Subjected social	1	-
		Beneficialized social actors	-	-
	Generization	7	3	
	Specification	Individualization	4	5
		Assimilation	-	-
		Aggregation	-	3
		Collectivization	4	5
	Inclusion	Association	-	-
Dissociation		-	-	
Indetermination		-	-	
Differentiation		-	-	
Nomination		5	6	
Categorization		13	4	
Functionalization		1	2	
Identification		Classification	11	7
		Relational identification	9	5
	Physical Identification	-	-	

Source: own elaboration.

In the movie *Saint Jacques . . . La Mecque* (Figure 2; Figure 3), the societal roles of female characters are mothers, wives, and daughters. From the professional point of view, they are teachers and hosts. For instance, Clara, the main female character, is a daughter, mother, and sister and, from the functional point of view, a teacher, which is a traditionally female profession. If we reflect on her character, we can appreciate the combination of multiple functions and representations. Behind her rude face, she is considerate and shows a strong sense of responsibility. She is worried about her brothers and Ramzi, who she finally adopts after his mother’s death.



Figure 2. Rural Moviescape of the Camino.



Figure 3. Clara and Camille discussing.

Figures 2 and 3 depict moviescapes representing the group pilgrimage. Figure 2 provides a view of the rural space of the Camino, whose snaking mark on the territory can be easily recognized. In Figure 2, the rural landscape of the Camino seems to be the main character, presenting the pilgrims with its essence and its challenges, aspects that pilgrims accept and seek [13,87]. A more detailed perspective is provided in Figure 3, where we see Clara (left) and Camille (right), who are pilgrims wearing comfortable clothing and carry their rucksacks. These female characters represent two age groups (adult vs. young), two social classes (middle class vs. rich), and two different perspectives and experiences that will determine their Camino.

#### 4.2. Movie 2: *Al Final del Camino*

In *Al final del Camino*, Pilar (the female protagonist) is a journalist for a magazine. She has just broken up with her boyfriend, and her boss (Imma) orders her to write a report on the Camino. This is why she walks with Nacho, a photographer. As soon as they meet each other, they hate each other deeply. They will have to create a journalistic piece and approach the famous guru Olmo, who (to solve the couple's crises) proposes they walk Camino. This is an interesting aspect of the plot as it points out the multi-motivational aspect of the Camino and its emergence in new spiritual and therapeutic practices produced and reinforced by its rural landscapes [88]. Far from religious motivation, we witness a dynamic representation of the Camino, which provides spiritual renovation enhanced by the enjoyment of the landscape [23,88]. Far from their daily routines and in a completely different environment, the pilgrims challenge themselves. Pilar and Nacho have no choice but to accept the work and continue the pilgrimage together, pretending to be engaged. It is a sort of meta-relationship that is created in terms of couple dependence, as their professional roles will depend on their relational tasks [71].

Following Van Leeuwen's [80] methodology, social actors' representations can be classified as follows (Table 3):

- Activation: The active female social actors are Pilar and her boss, Imma. Their active roles are maintained throughout the film. The main active male social actors are Nacho and the guru of the pilgrims' group. They are represented and usually referred to by what they do.
- Passivation: The five subject social actors are women. Two of them are not pilgrims, but they are described by means of a physical identification and as "very stupid girls". These actions are framed within scenes with sexual context. Within the group of the pilgrims, there are three women and six men. Two of them pretend to be homosexual, but their real intention is known to the girls, as occurs with the third social actor, who is a pilgrim. Each time she appears, there is a sexual allusion. Female pilgrims are the prey of the male social actors, as proven in the scene where two of the pilgrims try to get to know two female German pilgrims.
- Specification: This is obtained through individualization, with an unequal distribution of male (Nacho, Olmo, and Arturo) and female (Pilar and Imma) individualized social actors. The process of collectivization mainly concerns the pilgrims.
- Association: This refers to pilgrims who are considered entities.
- Indetermination: This refers to anonymous pilgrims.
- Nomination: Spectators know the names of the pilgrims of the group. The other characters are Imma and Arturo.
- Categorization: In terms of identities and functions shared with others, the dominant category is that of pilgrims.
- Identification: Concerning the relational identification, except for Pilar, the two other women of the group are wives, and the plot moves around their relationship with their husbands being in crisis. Within the status of pilgrims, the dominant categorization refers to wives and husbands or girlfriends and boyfriends. Thus, all the pilgrims of the group, apart from being recognized by their names, are classified as wife/girlfriend or husband/boyfriend.

**Table 3.** Cinematic discourse analysis in *Al Final del Camino* according to Van Leeuwen [80].

		Female Characters	Male Characters	
Exclusion	Background	1	-	
	Activation	2	5	
Passivation	Subjected social	5	1	
	Beneficialized social actors	-	-	
Generization		-	-	
Specification	Individualization	2	3	
	Assimilation	-	-	
	Aggregation	-	-	
	Collectivization	3	4	
Inclusion	Association	3	6	
	Dissociation	-	-	
	Indetermination	3	1	
	Differentiation	-	-	
	Nomination	4	6	
	Categorization	6	5	
	Functionalization	2	3	
	Identification	Classification	-	2
		Relational identification	4	3
		Physical Identification	2	-

Source: own elaboration.

Concerning this social status, the content analysis and the visual code show how the female social actors are represented as passive actors, especially in the sexual relationships, where they are the weakest partner. They are abandoned; they are harassed and used. As the female protagonist says: "You cannot use me all lifelong". Generally, they are represented as hysterical, confused, unsatisfied, liars, and unable to understand the situation (language, etc.). In Figure 4, Pilar (on the left) and Olmo (on the right) are talking; in the background, we see other pilgrims arriving. In Figure 5, the two pilgrims are brushing their teeth in a bathroom of a hostel along the route. Although it is a normal-seeming image, if analyzed deeper, the female pilgrim is younger than the male. Looking at the entire scene, this passage contains sexual allusion; once again the female pilgrim is the prey of the male pilgrim.



Figure 4. Imma and Olmo talking.

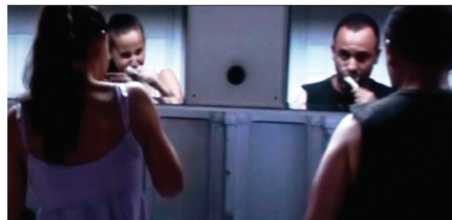


Figure 5. Pilgrims brushing their teeth.

#### 4.3. Movie 3: *The Way*

In *The Way*, the protagonist is Thomas. He is an American ophthalmologist who travels to France due to the death of his son, Daniel. Daniel died while walking the Camino, when he had just began the journey. Although at the beginning Tom only intends to retrieve his son's body, he later decides to complete the pilgrimage to allow him to accomplish his son's goal. During his journey, he meets several pilgrims, and three of them become his companions.

Following Van Leeuwen's [80] methodology, the social actors' representations can be classified as follows (Table 4):

- Background: The background actors are relatives of Tom (mother and wife), Joost (wife and brother), and Sarah (husband).
- Activation: The male active social actors are Tom (the protagonist), the waiters, and the policemen. The female social actors are Tom's secretary, a waitress, and a host.
- Genericization: Two policemen are represented with generic references.
- Specification: This is achieved through individualization with three men and two women who are depicted as individuals. Collectively, the two communities represented here are that of the pilgrims (apart from the protagonist), containing three women and nine men. The other community is the gypsies, formed by various women and men, but counting them was difficult (apart from the boy who steals Tom's rucksack).
- Nomination: The four members of the group are identified by their names. Further nomination processes concern Tom's son (Daniel), Tom's friends, and Tom's patient and secretary.

- Categorization: The represented social categories include hosts (a woman and a man), one waitress, and one secretary.
- Functionalization: Those who are referred to in terms of the function are Tom, Daniel, the police commander, and Jack (the Irish writer). There is no clear reference to the jobs of the female pilgrims; for instance, we do not know what Sarah does in terms of employment.
- Identification: The classification, which behind the general classification between Europeans and Americans, is mainly based on nationality. Each time pilgrims present themselves they state their origin. For instance, the group consists of three men from the USA, Ireland, and the Netherlands, and a woman from Canada. Concerning the relational identification, the most evident relation is that between Tom and his son Daniel, followed by that between Sarah's husband and Joost's wife.

**Table 4.** Cinematic discourse analysis in *The Way* according to Van Leeuwen [80].

		Female Characters	Male Characters	
Exclusion	Background	3	2	
	Activation	3	5	
	Passivation	Subjected social	-	-
		Beneficialized social actors	-	-
	Generization	-	2	
	Specification	Individualization	2	3
		Assimilation	-	-
		Aggregation	-	-
		Collectivization	3 gypsies	9 gypsies
	Inclusion	Association	-	3
Dissociation		-	-	
Indetermination		-	-	
Differentiation		-	-	
Nomination		3	4	
Categorization		3	1	
Functionalization		-	3	
Identification		Classification	2	5
	Relational identification	1	3	
	Physical Identification	-	-	

Source: own elaboration.

From a gendered point of view, the male social actors dominate (Figure 6). However, Sarah, the main female character, is initially mysterious and rude, although her other companions define her as “sexy”, and do not reveal the real reason why Tom is walking the Camino. Her statement “European guys are too confident, so I prefer to leave” (minute 38) envisions a typical relationship between a man and woman, predator and prey. This stereotype is reinforced when she reveals that in her life before the Camino, she was married to an abusive husband. For her, the pilgrimage is an emotional chance to overcome her choice to have an abortion due to the husband who mistreated her. Thus, we are presented with a traditional image of a woman who is rather weak and cries when overcome by her problems (Figure 7). Figures 6 and 7 represent two different landscapes of the Camino: there is an outdoor cinematic landscape that serves the aesthetic principles of cinema due to its territorial richness and the magic atmosphere of faraway places [26,59], and the inner landscape that pilgrims access due to the cathartic experience that they are living (Figure 7) [23,24].





Figure 6. Pilgrims walking.



Figure 7. Sarah crying.

#### 4.4. Movie 4: *Onde Está a Felicidade?*

In *Onde está a Felicidade?* the female protagonist, Theodora, learns that her husband (Nando) was maintaining a virtual relationship and is in crisis, resulting in the loss of her job as presenter of a culinary program (cooking competences are connoted as female). Disillusioned, she decides to walk the Camino, considered a journey of self-discovery. Her former boss suggests to her to make a reality show during the pilgrimage. Theodora makes a new friend, Milena, a Galician pilgrim who has been left by her Brazilian boyfriend; she decided to walk the Camino because she wants to become rich. During the pilgrimage, Theodora has a fun adventure, while Nando plans to win back her love.

Following Van Leeuwen's [80] methodology, social actors' representations can be classified as follows (Table 5):

- Activation: The professions represented in the film are those of Theodora and Bruno. The former is a TV show presenter; she is accompanied by her aesthetician and her technical assistant. Further active female roles are the hosts and the tourist office employees (as in *Saint Jacques . . . La Mecque*). Apart from Zeca, Theodora's producer, the male active actors work with Nando in a TV sport program. The film is a proper activation process, as Zeca (the leader of the group) travels the Camino to produce a reality show based on Theodora's experience along the Camino.
- Passivation: The subjected social actors are mainly women, although they are not pilgrims.
- Genericization: This refers to an actor at the end of the film who pretends to be Theodora's Galician boyfriend.
- Specification: Individualization includes the protagonists and the main characters, Theodora, Milena, Zeca, and Bruno. They can be represented as specific, identifiable individuals for their professions and relational identifications.
- Collectivization: The two main kinds of communities are friends (three women and three men) and pilgrims (fifteen female pilgrims and nineteen male pilgrims).

- **Functionalization:** The women represented according to their functions are Theodora and the host of the pilgrims' hostels. Men represented according to their function are Bruno, Zeca, and the theater actor.
- **Identification:** The relational identification refers to the couple, Bruno and Theodora, which is present throughout the entire plot. Then, at the end, we are introduced to Bruno's parents.

**Table 5.** Cinematic discourse analysis in *Onde Está a Felicidade?* according to Van Leeuwen [80].

		Female Characters	Male Characters	
Exclusion	Background	-	2	
	Activation	7	5	
	Passivation	Subjected social	6	-
		Beneficialized social actors	-	-
	Genericismization	-	2	
	Specification	Individualization	2	3
		Assimilation	-	-
		Aggregation	-	-
	Inclusion	Collectivization	3 friends 15 pilgrims	9 gypsies
		Association	-	3
Dissociation		-	-	
Indetermination		-	-	
Differentiation		-	-	
Nomination		4	4	
Categorization		2	1	
Functionalization		3	3	
Identification		Classification	-	5
		Relational identification	3	3
	Physical Identification	-	-	

Source: own elaboration.

The visual analysis is centered on Theodora and Milena, who are usually accompanied by Zeca, a male guide (Figure 8; Figure 9). As shown by the moviescapes, their clothing differs from that of typical pilgrims and that used in the other movies. This shocking difference corresponds to the movie plot, which was constructed on a pilgrimage undertaken for a reality show, which is finally revealed as being a false pilgrimage. Thus, uncomfortable shoes, boots, pants, skirts, and heavy suitcases (full of useful objects typically used by women) reinforce the fictional dimension of the production. Clothes are communication tools that can be exploited to investigate how certain groups are categorized [89]. For this reason, these pilgrims become ridiculous and superficial, as is revealed in the final part of the movie. As shown in Figure 8; Figure 9, either from a semantic or an aesthetic interpretation, the contrasts between the rural landscapes of the Camino and the main characters are visible. Parts of the Camino, with its different natural and cultural aspects, are easier to walk than others, but the pilgrim-actors find themselves inadequate for the challenge of the Camino. Evidently, all of the technical choices correspond to the producer's intentions, which culminate in considering the Camino a serious experience that is not to be undertaken lightly.



Figure 8. Zeca carrying the bags.



Figure 9. Pilgrims lost on the Camino.

## 5. Discussion

While statistical and quantitative data seem to indicate positive trends (Figure 1), and since rural spaces are not free from gendered relationships that might be imbued with stereotypes and unequal messages, the sources of the research present some allusions to the gendered visual representation of the Camino. The emotions evoked by the cinema are centered on spatial and social representations through the subjective experience that interferes with the meaning-making process. Although film locations correspond to real spaces, spatial representations are not completely neutral and objective. The more realistic the location, the more realistic the treatment of the characters. This was the focus of this research. The rural spaces of these visual narratives transmit their authenticity; therefore, attention should be paid to the social and gendered relationships that are represented, as “scenic spaces should convey the existence of a world with both an internal coherent logic” [38] (pp. 4359–4360). This respect for the natural and monumental environment has emerged in movies, which convey the idea of sustainable tourism along the Camino. As movies are also concerned with transmitting sensations and atmosphere about places [90], the immersive experience of the Camino has potential. Besides personal details, the background motivation of the movies is a proper *quest*, which is a spiritual journey that involves the search for one’s self as part of an educational process of the individual [91,92]. The enjoyment of landscapes and environmental elements favor such physical and spiritual health [20,23,24,87]; thus pilgrims perceive the charm of the Camino, and are excited about what they are doing; a sort of “Camino effect” affects their vision. However, Honggang Xu [93] reminds us that public spaces are not innocuous and objectively defined, but are rather politicized, sexualized, subjective, and gendered. Additionally, Annette Pritchard and Nigel J. Morgan [72] warn that tourist landscapes are constructed as “masculinized” and built for the movement and enjoyment of men, often at the exclusion and isolation of women. Something similar emerges in the in the selected movies where, for instance, pilgrims’ guides are always men, alluding to their role as leaders.

Each producer loads the space of the Camino with their poetics, that is, their personal discourse according to which some aspects are prioritized over others. The *poiesis* (meant as creative power) is contained in the poetic aspects of a space, the aim of which is to express a socio-spatial dimension [94]. This process engenders aesthetic representations and power relations, derived from a subjective and cultural understanding of the space within filming. For this reason, it was possible to identify the

geo-poetics [95,96] and a geo-politic [97,98] of the Camino within the analyzed sources. The term geo-poetics denotes the multiple forms of representing the rural spaces of the Camino. The culture of origin, subjectivity, and experiences of the characters determine the transcultural representations of this pilgrimage route. The intensity of the geo-poetics depends on motivations, expectations, and ways of relating to the environment. In cinema, the setting, the places, and the décor have always represented some of the essential components of the production of a film. Thus, geo-poetics in the film production consist of understanding the cinematographic forms of the space that simultaneously provide a realistic framework for the action and the poetic support of a concrete and natural environment [99]. Geo-politics refers to representations, knowledge, and communications implied by this form of rewriting of the Camino rural space, as it produces relationships of knowledge and power between the creator and the observer [97,98]. For instance, the different modes of organization of the cinematic space enact political relationships that interpret the ideological issues related to the space. The motivation of the pilgrim-actors can determine the spectators' interpretations. Thus, also in the cinematic productions gender and sexuality are very much socially constructed through various power relationships [91,100,101], although female pilgrims perform and embody the same practices of the male pilgrims. For C. Figueroa Domecq et al. [100], the studies on gender and tourism are important because they deal with a dynamic social phenomenon like tourism. The access of female tourists to touristic spaces and their experiences are subjected to the gaze of men, and therefore female tourists' experiences are highly influenced and often involuntarily altered by unwanted male attention and sexual harassment [101]. In the cinema, textual and visual codes have manifold ways to express the producers' intentions, while being imbued with the cultural knowledge that denotes the space of the Camino. Referring to the movies considered, styles are different, but all of them widely use the synecdoche, as the most common female social representations work as references for the whole genre. It was possible to identify the use of gendered stereotypes that (consciously or not) appear in the filmic productions. In addition, the female characters correspond to typical female social roles:

- The female protagonists and main characters are active social actors. Their professions are gendered stereotypes; for instance, Clara is a teacher (*Saint Jacques ... La Mecque*), Pilar is a journalist for a fashion magazine (*Al Final del Camino*), and Theodora (*Onde Está a Felicidade?*) is a cook.
- In the two comedies (*Al Final del Camino* and *Onde Está a Felicidade?*), the female protagonists are victims of betrayal. In both cases, they decide to walk the Camino for professional reasons, and in both cases they are accompanied by a male colleague.
- Hosts of public and private hostels are played by actresses (*Saint Jacques ... La Mecque*, *The Way*, *Onde Está a Felicidade?*). Women work in pilgrims' offices (they sign the stamps or give the *Compostelas* once in Santiago). This is a characterization of female professions along the Camino.
- The diegetic analysis reveals that in three out of four films, female pilgrims' lives have been upset by a man (boyfriend or husband).

The comparison among the four movies revealed how the different treatments of the same cultural and territorial information rely on the use of filmic images as tools to construct a powerful (and successful) discourse. The real differences consist of the relationships between pilgrims and environment and between pilgrims and their Caminos. A different and more active representation of a female pilgrim was only found in the film produced by a female director—*Saint Jacques ... La Mecque* by Colin Serrau. The goal of feminist films to create other conditions of visibility for a different social subject [102] is achieved within the case studies, but the treatment of female characters still hides a certain degree of the patriarchal structure. The societal roles played by the female characters (wives, mothers, daughters, etc.) allude to the persistence of gender identities and models of representation that enable the exploration of the latent ideology within the abovementioned filmic productions. This reiteration occurs because tourism locations might not necessarily provide freedom from gendered social patterns [3]. The depicted female pilgrims are quite young, beautiful, and conform to the

aesthetic canons, as the above moviescapes show (Figures 5–9). In the case studies, the cinematic production does not escape inequalities and discriminations. The images reproduced on the screen do not limit their effect to a target public; rather, they determine the perception of the societal and sexual roles [103].

## 6. Conclusions

The trend in movies and television shows whose messages penetrate society and determine choices about tourism destinations and behaviors has been growing [104]. Locations and movie experiences are enhanced in memories by associating them with actors, events, and settings [48,50]. In film productions, the representation of rural spaces and their transformation into locations have contributed to a process of renegotiation, producing multiple moving images with their cultural message. The cultural and creative industries, in general, and audiovisual content, in particular, are tools used to construct powerful and successful discourses that promote the values of the territorial identity resources (environment, landscape, history, local culture, and heritage) [7–9]. This recent age of cinematic production is contributing to renegotiating the space of the Camino, producing multiple moving images. The screen anticipates the pilgrimage experience, explaining its essence and acting as a dynamic travel guide [26]. Through these films, the viewer can access feelings and emotions in advance that might, eventually, lead to the desire to undertake the experience, walking the same spaces and sharing the same experiences. Filmic productions about the Camino deal with a cultural and historical location that is easily recognizable due to its international popularity. In so doing, movies intentionally reappropriate its space, which becomes a representational space. The different spatial interpretations and representations depend on the interests and aims of the producers, who use gendered stereotypes to empathize with their public. However, this use of gendered stereotypes in the artistic representations to convey a symbolic and generalized notion is ideologically and culturally dangerous in that it perpetuates and transmits a distorted representation of reality [89]. When shooting in the rural locations of the Camino, treatment and representation are not equal. The female pilgrims, or rather celluloid women, are young, aesthetically compliant, and must arouse the interest of men, thus once again the study pointed out the power structure that underlies equity and reveals that gender is socially constructed even in cultural industries. In other words, the cinema is not free from inequalities and discrimination [105]; this is an alarming finding that should encourage producers to reconsider the cinematic creation of female roles.

As recently stated by Rubén Lois González and Lucrezia Lopez [106] (p. 447): “the widespread access to cultural industries results in a proliferation of cultural products that interpret new forms of knowledge production, ranging from spatial characterization to significant geographical insights”. The cinema is a form of social media and a social language of ideological content; it is a cultural production through which society takes the stage. As the Camino is attractive, it has earned the attention of many people. Cinematic production requires ethic production. Moreover, as the Camino involves spatial and cultural aspects, contemporary research on its narrative geographies needs to consider creative spaces like cinema that contributed to its spatial meaning-making process. According to the Countryside Commission [107], sustainability is one of the priorities of rural tourism development: “sustainable rural tourism consists in finding the correct harmony in the relationship established between the needs of the visitor, the place and the receiving community”. In addition, gender equality is explicitly listed in the 17 sustainable development goals [108]; thus looking to the future, the desired harmony should be conceived as social and relational sustainability, meant as a formula to ensure equal gender treatment and representation of spatial discourses that ensure visibility, as is the case of the Camino. It is necessary to reinforce the gender perspective in pilgrimage studies to investigate the terms of women’s participation and restore their image. With this purpose, this paper introduced a critical interpretation of the gendered stereotypes and patriarchal schemes of some filmic production along the Camino in order to support the need for social and relational sustainability in rural spaces. This approach was mainly based on exploring the social and functional relationships of the female pilgrims,

although future interpretations might follow, such as those exploring corporal pilgrims' geography in cinema.

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## Appendix A

**Table A1.** Representing social actors. Van Leeuwen's [80] key concepts used for the cinematic critical discourse analyses.

Exclusion	<b>Backgrounding</b>	Social actors are mentioned elsewhere, and we can infer who they are.		
	<b>Activation</b>	Social actors are represented as the active and dynamic forces in an activity.		
	<b>Passivation</b>	Represented as "undergoing" the activity,	<i>Subjected social actors</i> are treated as objects in the representation.	
		or as being "at the receiving end of it".	<i>Beneficialized social actors</i> form a third party that, positively or negatively, benefits from the action.	
	<b>Genericization</b>	Social actors can be represented by generic references (classes).		
	<b>Specification</b>	Social actors are specific and identifiable individuals.	<i>Individualization</i> : social actors can be referred to as individuals.	
			<i>Assimilation</i> : realized by plurality, mass nouns, and nouns denoting a group of people.	
			<i>Aggregation</i> is realized by the presence of definite or indefinite quantifiers that either function as the enumerative or head of the nominal group.	<i>Collectivization</i> : groups of participants are not statistics.
	Inclusion	<b>Association</b>	Groups formed by social actors and/or groups of social actors (either generically or specifically referred to) who are never labeled in the text (although the actors or groups who compose the association may themselves be named and/or categorized).	
		<b>Dissociation</b>	Associations are formed and unformed ("dissociation").	
<b>Indetermination</b>		Occurs when social actors are represented as unspecified, "anonymous" individuals or groups; <i>determination</i> is when their identity is, one way or another, specified. It is typically realized by indefinite pronouns ("somebody," "someone," "some," "some people") used in nominal function.		
<b>Differentiation</b>		Explicitly differentiates an individual social actor or group of social actors from a similar actor or group, creating the difference between the "self" and the "other," or between "us" and "them".		
<b>Nomination</b>		Social actors can be represented in terms of their unique identity by being <i>nominated</i> . Nomination is typically realized by proper nouns, which can be <i>formal</i> , <i>semiformal</i> , or <i>informal</i> .		
<b>Categorization</b>		Social actors can be represented in terms of identities and functions they share with others ( <i>categorization</i> ).		
<b>Functionalization</b>		Social actors are referred to in terms of an activity (something they do).		
<b>Identification</b>		Social actors are defined according to what they are.	<i>Classification</i> : Social actors are referred to in terms of the major categories through which a given society or institution differentiates between classes of people. <i>Relational identification</i> : represents social actors in terms of their personal, kinship, or work relations to each other. <i>Physical Identification</i> is always over-determined. Physical attributes tend to have connotations, and these can be used to obliquely classify or functionalize social actors.	

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Article

# Developmental Sustainability through Heritage Preservation: Two Chinese Case Studies

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**Abstract:** Cultural heritage is a vital part of a society's existence. This role has particular relevance for China, with arguably one of the largest stocks of cultural assets, tangible and intangible, in the world. Recognizing the tension between cultural preservation and economic development as a general context, this paper examines the specific additional challenges China faces in its rush towards economic development. In providing both generic and China-specific contexts, this paper has as its objective to understand how Chinese policy-makers, both central and local, attempt to resolve the contest between cultural preservation and economic development, specifically rural rejuvenation. Through two case studies—of Lijiang in Yunnan province and Rizhao in Shandong province—this paper shows contrasting strategies to leverage local intangible cultural assets. Comparing these strategies reveals both the advantages and challenges inherent in each. A successful strategy captures the benefits of cultural tourism while minimizing its costs.

**Keywords:** rural revitalization; rural tourism; heritage preservation

## 1. Introduction: The Role of Cultural Heritage Preservation

Cultural heritage, defined as “the legacy of physical artifacts and intangible attributes of society inherited from past generations” [1] has long had a legitimate claim to be a major, albeit non-material, dimension of human well-being because it embodies “all the shared products of a given society” [2,3]. UNESCO itself notes that “... heritage is a valuable factor for empowering local communities and enabling vulnerable groups to participate fully in social and cultural life.” (<https://en.unesco.org/content/preserving-our-heritage>). Thus, the original focus on monuments and material artifacts from Western civilizations has been greatly expanded to encompass cultural expressions in the form of objects as well as processes [4].

UNESCO's recognition, through its 2003 Convention for the Safeguarding of the Intangible Cultural Heritage (ICH), is particularly significant for Asia, where many traditions and practices are passed on from generation to generation verbally and through apprenticeships [5] (p. 21). It is of vital importance to China, with its huge inventory of cultural heritage assets from the country's millennia of history and vast geographical size. The large number and variety of experiences provide relevant lessons for situations in other countries and contexts. Considerable research exists on ICH in China [6–8] but there is no agreement on the success of China's efforts [9–11] in ICH preservation.

This paper has as its primary objective to provide a coherent narrative of China's changing strategies to capture the benefits from leveraging intangible cultural heritage tourism. Under this overarching framework, case studies of specific strategies are examined in detail to facilitate comparisons of the benefits and challenges each strategy produces. This is also how this paper is structured. The next section sets the general discussion linking heritage protection with economic development. The China situation provides the specific country context. In Section 4, analysis is undertaken of the evolution of cultural heritage tourism with sustainability as a long-term goal. Section 5 describes the two case studies and their comparison. Section 6 concludes.

## **2. Methodology**

In developing the narrative on the China experience, reliance has been placed on extant research, both generic research on ICH preservation and cultural tourism in a country-specific and cross-country context, and also specifically on policy studies on rural development in China. There has been an abundance of research, both generic and China-focused. The China context is important in that these strategies fit into rural development policies. These studies, employing a variety of methodologies, varying from sample surveys to secondary literature reviews, provide a coherent narrative of the evolution of policies and strategies. The analytical narrative that details the progressive sequencing of changes is laid out in Section 4.

A second qualitative approach is the use of the case studies method for two case studies at different stages of implementation. The advantages and drawbacks of the case study approach are well known. Even with its limitations with respect to generalisability [12], it remains a powerful tool for deeply probing the relationship between rural development and rural cultural preservation in specific contexts, drawing lessons from these case studies. Because of the relatively limited written resources for these cases, a number of interviews with key stakeholders of the dances have had to be conducted. This was especially true of Rizhao's Fishermen's dances, where public performances were temporarily prohibited during the Cultural Revolution years and were not revived until the 1980s, so that no records were kept. The methodology employed was akin to narrative policy analysis

## **3. Study Context**

**Cultural Heritage and Development.** The product of a society through history, cultural heritage represents its record, both of success and failure, in development. Because it exists in a community's daily lives, it is as much a mirror of contemporary socio-economic development as of historical achievements, both of which are themselves foundations for the future [12]. Cultural heritage preservation is then seen as an economic development tool, with targeted areas, geographic dispersion, projects of varying sizes, and modernization as tangible benefits. Thus Rypkema (1999) noted that historical preservation is a vehicle of broader ends, with positive impacts that include job creation, job training, product differentiation, small business incubation and tourism opportunities [13]. Iossifova (2014) lists the benefits of developing cultural tourism as part of cultural heritage preservation and local economic development. These include creating new jobs, providing job training and contributing to local self-sufficiency by substituting imported with locally produced goods and achieving "appropriate modernisation [10] (p. 37)."

However, the relationship between cultural heritage and development is contested. First, globalization and its tendency for the standardization of products and services, coupled with industrialization and mass production, have worked against the creative arts and cultural heritage [14,15]. Second, many planners prefer modernity, which makes for a more attractive environment over heritage architecture, unmindful of the positives that the latter bring by, among others, opening up local economic opportunities through tourism services [16,17]. Third, many development interventions have prioritized "progress" over heritage preservation, exploited cultural heritage economically in the name of cultural capital, and implemented culturally disruptive development projects [18].

To these contestations, direct trade-offs between cultural preservation and economic development in the implementation of heritage preservation projects must be added. Non-tangible examples of trade-offs include: retaining traditional cultural practices vs. adaptation to modern times; professionalization vs. retention of traditional norms in areas such as management and finance, and commercialization (catering to what tourists want) vs. traditional practices (keeping to tradition) that may include the shift to a central location from traditional locations.

The extent to which heritage preservation is compatible with sustainable development has also been debated. This debate has pitted those [19], who refute arguments of the inevitability of conflict between heritage building preservation and sustainability, and others [20] who emphasized the common goal of managing limited resources among both preservation and sustainability movements, against those who argue that conflict between these objectives does exist, an example being heritage buildings being major consumers of energy and generators of greenhouse gases [1]. Such conflicts may exist partly because policies may only focus selectively on economic sustainability, or partly because of implementation issues [21].

Given these conflicts, it is hardly surprising that conflict theories have been widely applied to analyse endeavours leveraging cultural heritage for development, the most common of which is tourism. Yet, as McKercher, Ho and Du Cros [22] show, there is no inevitability to this conflict, with different models applicable within a broad conceptual framework. Nevertheless, the potential for goal conflict is compounded in the China historical, political and social contexts, with its huge and diverse stock of cultural heritage, both tangible and intangible, that defy the best efforts of government to manage (next Section).

**The China Context of Cultural Heritage Protection.** China is arguably one of the richest repositories of cultural heritage, spanning millennia of Chinese civilization, history and cultural traditions. In addition, through thousands of years of historic interactions with neighbouring areas and other parts of the world, China has also played an important part in the cultural heritage of these territories [23] (p. 70).

China's history of heritage conservation was said to date from the 1930s [24] (Wang, 2008). Despite this, only a fraction of historical heritage sites had been recorded, with many others lost to posterity [25]. In 1982, shortly after liberalization in 1978, China passed the Law on the Protection of Cultural Relics, which established a conservation system, and a list defining "famous cities of historical and cultural value". In 1986, a second group of famous cities was added to the first. In 2002, the 1982 Law was revised to define historic areas as "small towns, neighborhoods with an unusual wealth of cultural relics of important historical value or high revolutionary memorial significance". This would be the precursor of the 2003 UNESCO International Convention for the Safeguard of the Intangible Cultural Heritage of which China was a signatory. In 2005, the State Council issued the *Circular on Strengthening the Conservation of Cultural Heritage*, which distinguished between tangible and intangible cultural heritage for the first time. Following the Circular, in 2006 and 2008, the first two groups of national ICH were listed and published. More recently, the government maintained its focus on the country's ICH by adding three traditional holidays—tomb-sweeping day, dragon-boat day, and mid-autumn day—as public holidays.

Despite this recognition through legislation, there exist legislative deficiencies [26] and inadequate attention at the sub-national levels, which are given to viewing cultural heritage as an integral part of development, and thinking even less of sustainable development [27] (Petronela, 2015). Shen and Chen (2010) attributed the destruction of many heritage sites to the country's rapid transformation: "Resumption of private ownership, market exchange, urban development, labor mobilization, and booming tourism all became new human threats that endangered sites and objects ... " [25] (p.75). This inadequate attention, mostly through ignorance of heritage management, and consequently of resources has seen "China (losing) some 70 percent of its historic cities and an estimated 44,000 ancient ruins, temples and other cultural sites over the last twenty years" [10] (p.10). Despite the Central

Government's efforts, local interest in the implementation of cultural heritage has been limited, and sporadic and financial and human resources scarce.

These challenges are balanced by several significant positives. Among the latter are: (1) the launch of the Third National Heritage Site Inventory that increased the number of registered immovable cultural properties to 760,000 and that of state priority protected sites to 4296; (2) significant improvements in a large number of these sites; (3) conservation campaigns at national capital construction sites; (4) systematic listing and management of Chinese sites on the World Heritage List; (5) theory development about cultural heritage conservation and identification of new types of cultural heritage; and (6) the annual organization of the Wuxi Forum on the Conservation of China's Cultural Heritage [28]. China has also set up an Intangible Cultural Heritage Protection Network, comprising nearly 2500 institutions with over 17,000 personnel as at the end of 2018 [29].

Even as these efforts were ongoing, a new strategy has been conceived that connects rural rejuvenation with cultural heritage-based tourism. China's new approach to rural development represents an attempt to slow, if not reverse, the rural–urban migration flow and to see rural development resume its original role as a growth driver for China's economy, a role long sacrificed for urban development [30] (Zhuang, 2019). How well the objectives of cultural heritage-based tourism align with those of rural development is briefly sketched out in the next section.

#### 4. Analysis: Cultural Heritage Protection through Rural Rejuvenation

China's rural development experience is arguably unique (Table 1). Lewis' (1954) model [31], which explains the transition from a subsistence to a capitalist economy that is often cited to explain the inevitability of rural to urban migration in developing economies, is not supported empirically in China [32–35]. Chinese data for 1990–2013 reveal an urban–rural income gap that has an inverse U shape. A widening gap between rural and urban area incomes persisted until the mid-2000s, followed by a reverse trend thereafter, suggesting the closing of the urban–rural disparity.

**Table 1.** Timeline of China's Rural Development and Cultural Heritage Protection.

Time Period	Policies	Impact
1978–2005	Surplus agricultural labor from economic liberalization fuelled rural–urban migration, but restrained by township and village enterprises (TVE) growth, household registration system	Income disparities, rural–urban migration, but Lewis model not fully applicable
1990s to 2006	1990s reclassification from rural to urban: no migration. However, rural property restrictions, tax reforms increased pressure on migration	"Vacant rural residence phenomenon"
2006	Policy of increasing urban land and reducing rural residential land: "new rural construction"	Mixed success, top-down, failed to take into account rural residents' views
2014	"People-oriented approach", or "new urbanization"	Bottom-up approach more acceptable to rural residents
2018	"Rural socialization" integrates rural and urban stakeholders, consistent with "rural rejuvenation" strategy	Rise of "cultural-oriented rural development", leading to heritage tourism.

The widening gap early on resulted from China's early transition economy reforms. Even before liberalization, a household registration system (HRS) was put in place in China, causing severe rural and urban social–spatial disparities that lasted decades [36,37]. Under the HRS, rural residents could not enjoy the social welfare benefits available to urban residents and population movement was restricted. After liberalization reform, rapid urbanization eroded the efficacy of the HRS. To absorb surplus labor released by agricultural liberalization, the central government promoted the establishment of township and village enterprises in the 1980s that allowed rural residents to be reclassified as urban without

physically moving to cities (“Move to town rather than City (*Jincheng bu jincun*)”). For a while, this eased the pressure of rural–urban migration, but the measure was criticized for just stemming the urban flow rather than developing rural areas [38,39]. In the early 1990s, the heightened pace of urbanization forced local governments to create administratively new urban areas through the amalgamation of towns and counties. Statistics showed that 64 counties were reclassified as cities between 1986 and 1988 [40].

While the above developments would seem to vindicate Lewis’s theory, rural property restrictions imposed by China’s central government actually inhibited rural–urban migration. All land in China belongs to the state; however, whereas urban land could be traded in the open market, while rural land could not. The result was migrants from rural areas leaving their rural homes unoccupied, creating “Vacant Villages” (*Kongxin Cun*). To make things worse, decentralization and tax reform in 1994 rendered urban land leasing a major income source [41–43].

Given this undesirable state of affairs, a new phase integrating rural and urban development began when the central government put forward the “increasing urban land and decreasing rural residential land” policy in 2006 to demolish rural vacant houses and consolidate rural land use. The freed-up land could then be traded in the land market and used for urban development. Dubbed “new rural construction”, the focus was on urbanization, with land the policy instrument and the approach “top-down”. Local governments seized this opportunity to acquire rural land, relocating rural residents into high-rise apartments without regard for their willingness [41–43].

Despite some successes, variations in local conditions and differences in government capabilities and involvement meant that the above approach encountered only mixed success. Taking account of local conditions ushered in rural development reform that came, since 2014, to be known as “New Urbanization”. This new approach aimed to urbanize China through a more “people-oriented approach”, correcting the errors of the earlier “land-oriented approach” [44]. This represented a breakthrough in terms of its bottom-up policy-making based on local stakeholders’ preference [45], and was to provide the conceptual framework for the current comprehensive approach of “Rural Rejuvenation” centered on “people development” [46].

Clearly, while national policies such as “City supporting rural village”, and “Industry financing agriculture”, have all promoted rural development that, together with national economic growth, diminished China’s rural–urban disparities since the mid-2000s [47], China’s experience with rural in situ development had also run counter to Lewis’s theory since 1978, primarily because conditions in rural China were materially different from those in a “typical” developing economy. Thus, China’s rural income in megacities was not dominated by agricultural activities but by operating income (shareholder dividends from collective enterprise), land-leasing rents, and wages from urban activities [48–52]. Meanwhile, rural peasants enjoy rural life, and refuse to relocate to urban areas, many choosing to commute between rural and urban areas [53–55]. Further, some rural households were able to develop private businesses in villages [56–58]. These factors enabled in situ rural development to achieve a degree of success [59–61].

Consonant with “people-oriented rural development”, Yan Chen & Xia (2018) advanced their Rural Socialization Theory, which asserted that China’s rural regeneration requires not only the engagement of local stakeholders (local grassroots, local government), but also the participation of local counterparts [62]. This theory posits that China’s expanding middle class, characterized by high income and education and accounting for 37.4% of the total population, requires personalized consumption that can be met partially by rural activities. For instance, urban environmental pollution renders vacations and holiday residences in rural locations attractive for the urban middle class, thus, giving impetus to rural rejuvenation [63–65]. Rural socialization also entails agriculture industrialization and economic sector integration, synthesizing primary, secondary and tertiary sectors.

Rural socialization, through its engagement of both rural and urban stakeholders, allows rural residents to trade land contract right and operating right (*Sanquan Fenzhi*) in the markets, thus attracting urban capital into rural areas and promoting urban–rural integration [66–68]. With urban capital, rural



agro-industrialization can occur through consolidating fragmented farmland and commercializing rural land. Rural residents who hold land rights become enterprise shareholders, and are able to diversify and increase their incomes. There is therefore integrated development of urban and rural areas, ensuring that rural development fulfils both local and urban needs.

The benefits of this approach notwithstanding, the challenges are many. This approach has been criticized for its heavy fiscal burden on local governments, since rural migrants now enjoy rights accorded to urban residents [69]. Rural revitalization can also be confronted with its historical legacy of neglect and primacy accorded to urban areas) [33,45]. Cheap land or tax privileges may also attract enterprises with heavy pollution, affecting the local environment and future development. Finally, urban renewal often sees the demolition of old buildings, and cultural heritage sites can be lost through this process [70].

An important consequence of this approach is the emergence of cultural-oriented rural development as a tertiary sector activity. Empirical research shows rural residents benefiting economically by diversifying their income sources, with rural areas adopting tourism to boost their rural economies [33,71–73]. In keeping residents gainfully employed, heritage tourism allows local residents to diversify their incomes, retain rural residents and ease the urbanization pressure. Meanwhile, through training in these cultural activities, talents are developed that can form the backbone of the tertiary sector. This mode of rural development can be classified as (1) people-oriented rural development aiming to attract urban tourists through commercializing a culturally specific, ethnic and/or rural ethnic lifestyle; (2) geography-oriented rural development, which attracts tourism with the possession of natural or geographical landscapes; and (3) agro-based rural development, that promotes tourism through “back to the land” farming activities.

This is in addition to the socio-cultural benefits of heritage protection, which make for a sense of identity and cohesion within the community, while simultaneously ensuring the preservation of its cultural heritage. It is also a good fit for “people-oriented rural development” that requires local stakeholders’ participation to reshape the rural economy based on local characteristics. To the extent that this form of tourism does not rely on the possession of physical assets or endowments, it can be applied to hilly or poor agricultural terrains and small urban centers that lack the agglomeration advantages large urban conurbations possess. The timing of this strategy is also opportune, given China’s enthusiastic response to UNESCO’s prestigious “Masterpieces of the Oral and Intangible Heritage of Humanity”, which not only raised consciousness but also provoked tremendous domestic pride [74].

## **5. Empirical Analysis: Pairing Tourism with Intangible Cultural Heritage Protection—Two Case Studies**

Tourism is often paired with cultural heritage preservation, with the former contributing to financially sustainable tourism policies, benefiting communities and developing virtual traveller communities [75]. Case studies also underline this relationship [76,77].

Although case studies are famously known to lack generalizability, and China’s circumstances may not be easily replicable in other countries, there exist generic lessons from which other cases can be drawn. One is potential contestation between heritage preservation and sustainability. Another is local vs. state ownership. Yet another is achieving a balance between the costs and benefits of cultural tourism, all of which affect such projects to some degree. Tourism’s role has become particularly important, as China attempts to include its use as a strategy for the country’s rural rejuvenation, leveraging the abundance of intangible and tangible cultural heritage assets. While other countries may not stress such a linkage, they may well have linkages with other policies.

In this section, two cases (Figure 1) are examined. Lijiang, located in middle-east China in one, representing the successful use of tourism as an instrument for heritage preservation and income generation, and Rizhao, the coastal city in northeast China at a crossroads as it seeks to leverage and preserve its cultural heritage assets for posterity, are discussed.



**Figure 1.** The geographical location of two case areas. Source: Obtained from <http://bzdt.ch.mnr.gov.cn/index.html>.

### 5.1. Case Study 1: Successful Commercialization—Lijiang

Lijiang, in the northwest of Yunnan province, China, is a well-known historical city, dating back to the Song Dynasty. With its ethnic diversity, local customs, handicrafts, scenic town streets, and riverine location with water from a stream flowing through the streets, Lijiang has leveraged its scenic setting to boost tourism, further fueled by its intangible cultural heritage—local dance.

The “Impression Lijiang” is a live dance performance directed by renowned film director Zhang Yimou, entailing an investment of RMB250 million, that portrayed the Dongba ethnic culture (Figure 2). Using the Yulong Mountain as the background, the dance is performed by 500 rural peasants from 16 Yunnan villages [78]. The dance’s attraction to tourists lies in its spectacular staging of the minority’s ethnic culture and history in a natural setting.

Launched in May, 2005, with performances beginning in July, 2006, and tickets at RMB 190, the performance has since been a major source of income for Lijiang. In 2015, the Annual Report of the Lijiang Yulong Tourism Co. Ltd., Lijiang’s tourism management company, reported ticket sales of RMB219 million alone, with additional revenues from hospitality at RMB 96 million, ropeway walking tours at RMB414 million, and from other services at RMB57 million. In the next few years, it triggered related activities in rural areas that, while generating incomes locally, resulted in income from the Impression Lijiang performance falling dramatically from RMB 254 million in 2014 to RMB 98 million in 2018. Overall, however, it is a great innovation in rural development, allowing the diversification of rural incomes resources and increasing rural incomes greatly, boosting the local hospitality and restaurant sectors, and contributing to rural regeneration.

The Impression Lijiang performance created a commercial environment that inspired rural innovation in the surrounding areas. Thus, it attracted exogenous social capital input into developing the area, attracted urban tourists and investment, and mobilized local residents to respond to these external stimuli. It also spawned an innovative rural development strategy that takes advantage of a commercial environment. As a concrete example, sensing tourists’ interest in the “Tea-Horse

Road” passing through the city and performing in the “Impression Lijiang” gala, local rural peasants in Hai Village voluntarily organized the Hai Village Tourism Cooperative, developing a tourism program for tourists to experience the ancient transportation mode. As of 2008, 140 out of the 160 rural households have joined the cooperative. The average number of horses per household reached three in 2008. By investing in horses in the cooperative, the households receive dividends from the cooperative [79]. The success of this cooperative caused surrounding villages to follow suit and established more than 10 cooperatives, thus shifting the rural development model from being agro-based to cultural-oriented village-based.



**Figure 2.** Impression Lijiang Dance Performance. Source: pictures collected from <http://dp.pconline.com.cn/dphoto/2218513.html>.

Meanwhile, rural incomes in the area rose dramatically while diversification also occurred, inspired by the single event. In 2004, Hai village’s annual household income average was RMB 2000, which rocketed to RMB 48,000 in 2007 and further to RMB 67,000 in 2008. This income surpassed that of its urban counterparts, which was RMB 40,000 in 2007 [79]. This contributed to rebalancing the rural–urban disparity. In contrast to the more conventional agricultural-oriented rural development mode, which pursues intensive land-use and scale economy through encouraging rural dwellers to invest in agricultural cooperatives or companies, the Lijiang model exemplifies another method of rural revival, especially for those locations with scarce land resources. For this model, how to translate intangible cultural heritage into tangible activities is vital to success.

Improving rural living conditions is the logical consequence of the rise in household incomes. Since the “New Rural Construction Scheme” proclaimed during President Hu Jintao’s era, China was attempting unsuccessfully to bridge the urban–rural gap through modifying rural living conditions [80,81]. The case of Lijiang shows how attention to cultural activities indirectly changed the physical environment of rural residents. With the diversified incomes from cultural activities, rural dwellers were able to refurbish their houses to pursue a better life. Some rural residents turned their

houses into home-stay hotels furnished with local flavour to emulate the style made popular in the “Impression Lijiang” performance (Figure 3).



**Figure 3.** Refurbishing Old Rural Houses in Lijiang. Source: the pictures are collection from ‘100 rural house refurbishing cases’, retrieved from [http://www.360doc.com/content/16/0819/17/33281137\\_584378177.shtml](http://www.360doc.com/content/16/0819/17/33281137_584378177.shtml).

Note: The picture shows two rural houses in Lijiang refurbishing process. The left two pictures depict the old image of the houses, while the refurbished houses are in the right column.

The performance helped reshape the rural community structure and build the credit system among rural community members. This is because the performance requires cooperation among all 500 participants. In addition, its related activities need the demutualization of resources they own. The establishment of the cooperatives is a reflection of demutualization, requiring a functional and systematic management and credit system. Among the scholars who argue for less government intervention in community management in more developed areas, such as having urban fringe villages or villages in downtowns shaping a “community of common destiny” [82], rural Lijiang is a good example. Demutualization and participation in the performance has helped to stem the flow of rural–urban migration and drive the community to function as a company to make bottom-up decisions themselves for the benefit of all members. It therefore fits into the ‘people-oriented’ concept of New Urbanization, with local stakeholders’ participation. Bu and Chen, (2011) found villagers in Lijiang were more active in expressing their views on tourism development than before. Village affairs, such as road building and the formulation of village ethnic regulations that were decided by village cadres in the past, are now controlled by the villagers themselves [79].

At the same time, rural development raises awareness of local stakeholders in cultural preservation. Fast urbanization in the last decades was criticized for its side effects of destroying building heritage and diminishing local cultural value [83]. On the other hand, migrants to cities are keen on urban

modernization and leaving their local traditions behind [70]. With these contrasting views, there is a danger that awareness of cultural heritage may gradually fade. However, Lijiang villagers themselves are now reshaping the community's cultural value and developing their history. They realize that cultural consciousness can sustain their communities. For instance, Naxi traditions and history helped to maintain their ethnic identity, the commercialization of which can create wealth. Therefore, dance competitions are frequently organized by villagers. Naxi cultural workshops and festivals are common events in rural Lijiang (Figure 4).



**Figure 4.** Lijiang Naxi Cultural Workshop in Rural Area. Source: pictures collected from Souhu news, retrieved from [http://www.sohu.com/a/234944331\\_391640](http://www.sohu.com/a/234944331_391640).

Lijiang's rural development has the advantage of preserving its rural environment and natural landscape. Both are part of traditional Naxi culture, illustrating the integration of people with nature. Rurality elements distinguish themselves from the urban, ensuring the sustainability of rural development in the long-run. For Lijiang, the basic concept behind rural–urban integration and cooperation is not assimilation but complementation. Perceiving this, director Zhang Yimou highlights in Lijiang Image the history, rurality and landscape in the Lijiang Image dance routines. For instance, leveraging on Yulong Mountain as background, the dance is performed by rural dwellers, expressing the human–environmental harmony and traditional rural activities (dance episode 1 and 4). Encouraged by the dance, more hotels in Lijiang are decorated by rural elements. The cooperatives in rural Lijiang provided the funding to maintain a clean environment and minimize environmental degradation caused by tourism activities.

### 5.2. Case Study 2: At the Crossroads—Rizhao and Its Fishermen's Festival Dances

Rizhao City with a current population of 3 million located in southern Shandong province facing South China possesses the topography, geomorphology, water resources, wind flow and other natural conditions to engage in maritime activities and this city is one of the biggest sea ports in East China. The maritime-based activities in Rizhao include deep sea fishing, import and export of fishing goods, and fish farming are the main sources of income in Rizhao.

Rizhao is well-known for more than its maritime industry. Located in an area of great antiquity, Rizhao is rich in cultural assets, both tangible and intangible. Of the former, the best examples are the Longshan and Dongyi cultures, from which a wealth of historic artifacts has been unearthed. Of the latter, examples are the traditional sun-worship rituals which developed from these early cultures, as well as the rituals of the Fishermen’s Festival, mainly the four dances, briefly described below (Figure 5). Its geographic location beside the sea, together with an abundance of sunshine, has made the city a major tourist destination, while its green credentials also make it a target for green tourism.



Figure 5. Festivals in Rizhao. Source: authors.

The Dances. The Fishermen’s Festival in Rizhao is a celebration of fishing as a livelihood of the residents of Rizhao City since ancient times. The Festival’s suite of four dances—the Dragon Dance, the Shui Dance, the Stilts Dance and the Han Boats Dance—is performed as unique worship ceremonies to honor the Sea Gods. These dances are described in Table 2 and photos of them are shown in Figure 6.

Table 2. Describing Rizhao’s Fishermen’s Dances.

The Dance	Description
The Dragon Dance	Origin unknown, but pre-Qing dynasty. Different versions all over China. Worship of dragon as lord of all sea spirits. Pray for protection during fishing and bountiful harvests.
The Shui or Aquatic Dance	Originated from Yuan dynasty. Prayer to appease sea spirits and creatures under the Dragon King. Dancers don costumes mimicking the deities of marine creatures.
The Han Boats Dance	Originated from Qing dynasty. Celebrates fishermen’s life at sea and wish for a comfortable life at home. Movements mimic work at sea
The Stilts Dance	Celebrates fishermen’s use of stilts to move their nets to deeper waters. Often celebrated ritually by combining it with the Hai Yang <i>Yangge</i> dance on land

Historical developments in China have shaped these practices and traditions, the Festival itself having undergone changes that affected the rituals and stature. The Festival today owes its revival to

China's economic liberalization in 1978, this revival coinciding with the increased attention paid to the country's intangible cultural assets by the state. Since 2005, the annual Chinese Cultural Heritage Day has been held by the Rizhao Municipal Government. The Fishermen's Festival was introduced as a Provincial Intangible Cultural Heritage by the Shandong Provincial Government in 2007 and a National Intangible Cultural Heritage by the Central Chinese Government in 2008. In a nod towards potential tourism, China's State Council also fixed the date of the Fisherman Festival to fall on the 13th, June of the lunar calendar of every year.



**Figure 6.** Dances of the Fishermen's Festival. Source: The pictures from Cultural Center of Rizhao.

In 2006, Rizhao's Dragon and Sui Dances were included in the first batch of Rizhao's "Intangible Cultural Heritage". In 2013, the skills of walking on stilts as well as "removing the Shrimp Skin" (*tui xia pi*) were selected for inclusion in the second batch. In June 2018, the issue named "Rizhao city—Sort out, Develop and Inherit the Stilts Dance" became the key topic in Shandong Province's art science field.

Challenges. Endowed with such a rich cultural heritage, considerable scope exists to combine heritage protection with developmental sustainability through tourist promotion in the footsteps of other similarly endowed sites. However, efforts to emulate successes immediately raises major challenges for Rizhao. The first is financial support. With many assets to support in the area around Rizhao, government funding is not sufficient to preserve the Festival in its original form.

The lack of funding affects the sustainability of the Dances because the meagre allowances for performers are already unable to maintain interest among the small pool of organizers and performers, who, by tradition, are all amateurs, and limits funds for research on the dances, which could lead to improvements in the organization and substance of the dances, and renders even the renewal of costumes and props for the performance problematic. Achieving financial sustainability is therefore paramount among all issues of heritage preservation.

Attempts to deal with these challenges have their own side-effects. For instance, the Rizhao city government, in organizing many activities to promote the Festival, had inadvertently changed the form and substance of the Festival, limiting the freedom of organizers and artisans to shape the Fishermen's Festival as they see fit and in keeping with tradition. This reflects the first area of potential conflict of interest between key stakeholders of the Festival.

Efforts to draw tourists by professionalizing performances, as have occurred in Lijiang, can also lead to dilution of traditional aspects of the heritage, emphasizing the parts of performances deemed to have greater tourist appeal. Reliance on professional performers also increases the distance between

performances with tourist appeal and traditional performances. An increase in the number of tourists to Rizhao can also bring environmental pollution and adversely impact the city’s green credentials [84].

There were other areas of conflict. To accommodate more visitors and a larger audience, the venue of these dances has been moved to Rizhao City rather than being performed in the villages which were their original venues. Catering to the tourist trade inevitably brings commercialization and professionalization, with the likelihood of the loss of traditional performance arts. Commercial success has therefore to be balanced against damage to cultural heritage.

Fortunately, innovative approaches now exist to bolster financing and other dimensions of heritage preservation that have yet to be attempted for Rizhao. To meet financing needs, social enterprises are being increasingly called upon to play the role that traditional channels have failed to play. Innovative efforts at revitalizing interest among stakeholders, especially organizers, performers and their kin, but also among audiences, through targeted approaches that separate ritual from entertainment, campaigns to stoke national pride, creating awareness through education, and rewarding artistes through conferring titles like “national treasures” have met with success elsewhere [18]. A new approach to tourism that takes advantage of “destination’s specificities . . . that involves prioritizing and targeting niche tourism” has also been proposed [85] (p.274).

5.3. Comparing Lijiang with Rizhao

While Lijiang and Rizhao possess many commonalities, they also stand out as contrasting models of intangible cultural heritage protection. Both are documented in Table 3. Among their commonalities, they both have traditional dances to showcase—the Naxi Ethnic Dance (Dongba Dance) in Lijiang and the Fishermen’s Festival Dances in Rizhao. In both locations, the festivities reflect strong cultural identities. They host a multitude of cultural heritage assets. Many of these assets, especially the dances, are of great antiquity, and they can showcase their cultural assets in impressive geographic settings. The performances are centrally located—the Impression Lijiang at the foothills of Yulong Mountain and the Fishermen’s Festival dances in Rizhao city.

Table 3. Similarities between Lijiang and Rizhao in Cultural Tourism.

Similarities	Contrasts	
	Lijiang	Rizhao
Rich in cultural assets	Focused on commercialization	Focused on heritage preservation
Strong awareness of cultural identity	Emphasizes performance	Emphasizes heritage, authenticity
Advantageous geographical location	Secondary benefits to other rural residents	No secondary benefits
Historical antiquity	Attracted urban investors, return migrants	Barely able to retain local talent
Strong cultural identity	Private sector has major role	State-driven
	Sustainability at expense of authenticity	Heritage preservation at expense of sustainability

These similarities are, however, overshadowed by their many differences. First and foremost is the manner of tourist promotion and heritage preservation. The Lijiang model has been much more successful, not only in ensuring financial sustainability but also in generating secondary benefits for related sectors like hospitality and for the rural community around Lijiang. The scale of Lijiang’s initiative has promoted rural innovation, reflected in creative ideas in organizing cooperatives. Meanwhile, the high incomes generated have attracted younger rural–urban migrants to return to their villages. Simultaneously, urban talents and residents have been keen to invest and stay, thus securing the long-term sustainability of the Lijiang project, and helping to achieve the rural rejuvenation



objectives of people-oriented development through intangible cultural heritage preservation. Still striving to ensure sufficient funding, organizers of the Fishermen's Festival in Rizhao have had much less to show for their efforts, having to make adjustments to attract tourist traffic just to stay afloat. Without adequate funding, the fishermen's Festival has, with the exception of tourism income, the quantum of which is unknown, bestowed limited benefits to the fishermen community and the residents of Rizhao.

This disparity does not mean that Rizhao does not have the potential to emulate Lijiang's achievements. It does mean that Rizhao is still at an early stage in planning for heritage preservation, although not necessarily in applying the Lijiang model in terms of deploying human resources and capital inputs. This disparity is also a reflection of the different priorities in the fiscal resources have been deployed. Lijiang has received substantial support from the Yunnan provincial government; the provincial government of Shandong, certainly no less wealthy than Yunnan province, has elected to allocate its fiscal resources to a range of tourism projects, leaving funding for the Fishermen's Festival and its dances in the hands of the Rizhao city government.

Despite Rizhao's apparent disadvantages, it can boast certain advantages. Whereas Lijiang's cultural heritage is embedded in an artistically created, spectacular but artificial extravaganza, Rizhao's remains largely true to its historical roots in the staging of performances. The formats of the dances are also substantively different. Whatever claims Impression Lijiang may have of complying with tradition, there is little doubt that a major objective of the performance is entertainment. The Fishermen's Festival dances have a much stronger claim to traditional authenticity, being still performed by amateurs to whom the rewards are uncertain. However, this adherence to tradition may see the art form gradually disappear for lack of interest. In this respect, Lijiang may have lessons for Rizhao, one of the most important being the corporatization of the dances to ensure not only professional management but also the participation of major stakeholders. As a final area of comparison, both Lijiang and Rizhao appear conscious of the need for environmental sustainability and the threat that heightened tourism poses. This is particularly the case with Rizhao, with its reputation as one of the greenest cities in China.

## **6. Conclusions**

There can be no question about the constructive role of cultural heritage, both tangible and intangible, in society in general and in development in particular. Given this role, efforts should be made to capture its benefits. However, this role is not without costs. These costs are associated with the possible increase in pollution that heightened tourist traffic will bring. The possible costs associated with departures from authenticity are also included. A developmental role for heritage preservation must seek to manage such costs while maximizing benefits.

With its considerable inventory of cultural assets, both tangible and intangible, China has to manage its costs to capture the benefits. As shown in this paper, the cost-benefit calculus is even more significant, since it is part of China's rural development. The lessons learned from this development experience, and from two case studies, clearly demonstrate the vital roles of key stakeholders—the state, at central, provincial and local government levels, as well as local communities—in capturing heritage benefits. In as much as the state has the resources, both financial and institutional, to promote heritage tourism, success also depends crucially on the community's identification with, and sense of ownership of, the cultural assets. As the Lijiang example shows, both can galvanize a community towards adopting measures to ensure sustainability.

The case studies also show that trade-offs exist between tourism promotion and heritage preservation. Achieving a measure of success in both objectives requires balancing—between heritage preservation and long-term sustainability, and between state control and community ownership. Besides these case studies, different approaches under the rubric of rural rejuvenation may well produce innovative models that can be prototypes for tourism that also ensures heritage preservation. At the risk of generalization from the case studies, the key to successfully combining sustainability with heritage preservation likely lies with the state's leveraging bottom-up strategies that demonstrate

“thorough understanding of local specificities ... (and) take into account the characteristics and long-term needs of local residents and how they inhabit their local environment” [10] (p. 37).

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