44ᴛʜ Eᴜʀᴏᴘᴇᴀɴ Cᴏɴɢʀᴇss ᴏғ ᴛʜᴇ Eᴜʀᴏᴘᴇᴀɴ Rᴇɢɪᴏɴᴀʟ
Sᴄɪᴇɴᴄᴇ Assᴏᴄɪᴀᴛɪᴏɴ (ERSA)
"Rᴇɢɪᴏɴs ᴀɴᴅ Fɪsᴄᴀʟ Fᴇᴅᴇʀᴀʟɪsᴍ", Uɴɪᴠᴇʀsɪᴛʏ ᴏғ Pᴏʀᴛᴏ, Pᴏʀᴛᴜɢᴀʟ

Rᴇɢɪᴏɴᴀʟ Cᴏᴍᴘᴇᴛɪᴛɪᴠᴇɴᴇss ɪɴ Tᴏᴜʀɪsᴛ ʟᴏᴄᴀʟ sʏsᴛᴇᴍs

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Abstract

Since the past century, Marshall had described some industrial districts, in England, as agglomerations of small and medium enterprises specialized in a specific production activity. Starting from his contribute, in the last decades an immense literature has been written on industrial districts in Europe and around the World. Italian scholars gave particular attention to this local system of production and extended and developed the concept coined by Marshall. In other countries, different territorial models played a central role as milieu or cluster, for instance. In particular, in the last years these models have been extended to non-industrial fields like culture, rural activities and tourism.

In the first part of the paper, a review of the main contributions on the territorial models applied to the tourist industry is proposed like the tourist milieu (Peyrache,-Gadeau, 2003, Bramanti, 2001), tourist cluster (Gordon, Goodall, 2000; Nedlac, 1999; Van Den Berg, Braum, Van Winden, 2001) or tourist district (Becattini et ali., 2001; Aci-Censis, 2001; Antonioli Corigliano, 1999). Thus, we define a model of tourist district and we address how extend to the tourist industry the competitive advantages

created from networks of traditional marshallian industrial districts (Marshall, 1966; Becattini, 2000).

In the second part of the paper, we perform a methodological exercise of spatial identification through GIS tools. The methodology of identification of industrial districts elaborated from Sforzi (1990) is extended to tourist industry and the adaptability of our model in the Italian territory is verified. The analysis starts from the travel-to-work areas (TTWAs) (Smart, 1974; Combees et al., 1982), which interprets the daily commuting flows due to work reasons defined in Italy by the ISTAT on the 1996 Intermediate Census on Industries and Services. A map of the Italian TLS is presented.

1. INTRODUCTION

European Commission has emphasized the challenge to improve the quality of life in the regions and cities of the Community, guaranteeing a high competitiveness and promoting the sustainable development. Therefore, the study of new hypothesis of local development has an important role, involving the available resources in the territory to be preserved and enhanced, in order to create sustainable and reproductive process.

In the last decade, travel and tourism industry (TTI) has been one of the "biggest industry of the world economy" (WTO)[1]. Authorities, local entities and regions have been more and more focusing in this industry. According to the statistics from the World Tourism Organization the world tourist arrivals reached 650 millions in 2001. Money expenditure is still increasing, as it has grown from 2 billion dollars of 1950 to 455 billions in 2000.

Regions and European places, undoubtedly, are characterized by the presence of Artistic Cultural and Natural Heritage (CANH, Lazzeretti, 2003). This heritage is the basis of a competitive tourist attraction and if enhanced and preserved, it is able to create a competitive sustainable advantage.

The purpose of this research is to analyze the themes of local development of a place with tourist attractions (artistic, cultural and natural heritage) and to verify if a

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[1] Tourism Highlights Edition 2003, World Tourism Organization, 2003. Available at: http://www.world-tourism.org/market_research/facts/highlights/Highlights.pdf

tourist production system can play a role as engines of development, underlining its characteristics and differences.

The main aim of this research will be to define a local agglomeration, related to the tourist business, and verify its capacity to generate employment and produce wealth, considering the territorial dimension and its socio-cultural feature embed in the local context. A tourist district model is proposed as an opportunity to extend the marshallian industrial district to tourism industry analyzing an agglomeration of SMEs (Gordon and Goodall, 2000).

In the next paragraph we review the systemic approach to travel and tourism industry focusing, in particular, on the concept of *"Tourist Destination"*. In the third section we present a literature review about territorial models of industrial origins extended to TTI. In the fourth paragraph we propose a new model, namely the tourist district. The fifth paragraphs addresses an empirical analysis of the Italian territory. Finally, we discuss the main results and draw some conclusions.

2. SYSTEMIC APPROACHES TO TTI DESTINATION

Since the seminal work of Marshall industrial districts have been described as agglomerations of small and medium enterprises specialized in a given production activity. Starting from his contribute, in the last decades an immense literature has been developed on industrial districts in Europe and Worldwide. In this context, the Florentine school has played a major role (Becattini, 2000).

Italian scholars, have recently paid a particular attention also on local models of development of no industrial origin (Becattini et alii, 2001) in order to pinpoint the interconnection between industrial districts with the complex paths of their local development.

Our objective is to focus, in particular, on the connection between the district approach of the Florentine school and the tourist district, as a model of local development able to produce wealth and employment. The object of our analysis will be an agglomeration of enterprises, sharing a same background and social experiences, that conserves and enhances a set of artistic, cultural and natural resources of the local context.

Systemic approaches in tourism studies are not new. In the last ten years, the international specialistic literature has forged the concept of "*Tourist Destination*". The attention is focused on strategies and on marketing actions of a place considered as a system of actors that cooperates in order to supply an integrated tourist product. European Commission defines a Tourist Destination as :

*"as an area which is separately identified and promoted to tourists as a place to visit, and within which the tourist product is coordinated by one ore more identifiable authorities or organizations" (*E.C., 2000*).*

Moreover, E.C. stresses the importance of the tourist perception of the locality and of a systemic approach to the quality management:

"As far as tourists are concerned, however, the satisfaction derived from staying at a destination does not just depend on their experience of tourist services, but also on more general factors such as hospitality, safety and security sanitation and salubrity, traffic and visitor management" (*ibidem*)

First of all, a tourist destination is defined as an area, a territorial entity within defined boundaries. Furthermore, the literature focuses on developing strategies in order to involve not only the local actors, but also different stakeholders inside and outside the locality.

Tourism industry is considered a sector with a fragmented structure and characterized by the presence and collaboration of a wide number of actors of the filiere (tour operator, travel agents, passenger carriers, hotel and other service providers). Visitors face a huge amount of stimuli related to crucial factors such as safety, security, sanitation, salubrity and traffic. Therefore competitive advantages of places are more and more related to a population of local actors supplying a complex final product: the travel experience (Asworth, 1991).

In particular, a tourist destination is described as a place characterized by two key elements: the inner dimension - a territorial coherent geographical space with a set of actors working together - and an external perception based on its perception and image i.e. its significance for the tourists.

The concept of Destination Management has been developed by the original contribute of Ritchie, Buhalis, Pechlaner, Weissmaier, among others, that analyze tourist systems as a unique group of actors localized in a common place.

In order to decompose a complex entity like a tourist destination, the industrial district theory can be helpful and provide a suitable interpretation key. First of all, Travel and Tourism Industries (TTI) are typically based on medium and small enterprises. Secondly, *loci* are characterized by strong ties among industrial players and the local communities. The opportunity of a territorial approach emerges focusing on places in order to develop a process of local economic development.

The tourist district could therefore assume all these characteristics like an interpreting model and ideal type of local development of a embedded system of enterprises in tourist activities that can generate wealth and occupation, and enhance the local resources.

In the next section we present a literature review about territorial models of industrial origins extended to TTI in order to focus on specific features of each model and propose a new model, namely the tourist district.

3. INDUSTRIAL TERRITORIAL MODEL APPLIED TO TTI

The renewed interest related to industrial cluster bases its origins on the studies of Michael Porter. Porter focuses how in a more and more global economy the competitive advantages are increasingly linked to specific local places and localized knowledge.

In "the competitive advantage of nations" (1998) Porter describes how industries tend to localize in a particular area and constitute localized cluster[2].

The author defines cluster as *"... a geographic concentrations of interconnected companies and institutions in a particular fields"*[3]

Porter's analysis has focused mainly on industrial sectors but there are also references to the tourist industry:

"a host of linkages among cluster members result in a whole greater than the sum of its part. In a typical tourism cluster, for example, the quality of a visitor's

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[2] We utilize the concept of cluster of porterian origins; nonetheless the concept is not really clear. For a review about the definition of cluster see "Regional Cluster in Europe" (E.C., 2003): Californian (Scott and Storper), Nordic (Asheim, Amin, Isaksen, Cooke), and porterian school.
[3] The concept is closed to an agglomeration of enterprises and the main difference from the industrial district is the thickening of social relations of the local community and the prevalence of SMEs.

experience depends not only on the appeal of the primary attraction but also on the quality and efficiently of complementary businesses such as hotels, restaurants, shopping outlets and transportation facilities. Because members of the cluster are mutually dependent, good performance by one can boost the success of the others"[4].

The contributes on tourist clusters are still limited. The main work has done by Nordin (2003) that starts from the porterian approach. The author applies, in particular, the porter's diamond, extending this concept to the TTI and she focuses on the role of a cluster of tourist enterprises, in particular on the role of innovations. The work focuses mainly on the necessity to develop collaboration strategies and synergies in order to catch up a sustainable competitive advantage in a network.

Real studies are presented on the tourist cluster of Napa Valley, South Africa and other examples in Sweden.

This same approach was developed in South Africa by a consortium of actors and it took the name of "clustering approach" (Nedlac, 1999). Anyways, the "clustering approach" remains concentrated on boosting a network of actors to develop collaboration strategies.

Criticism is often strict against the porterian cluster approach. Martin e Sunley (2003) stated Porter's approach is far from being universally accepted in the areas of business economics, industrial organization and management studies and and often lacks of specificity and measurability.

Another approach more familiar with the social view of the ID is the one related to the *milieu innovateur*[5]. In fact, the role given to the social community is common in the two approaches. The concept of *milieu* comes from the French and Swiss literature. Original contributors were developed by Aydalot in the Eighties and recently by the GREMI group: Maillat, Crevoisier, Camagni *et alii.* .

Some scholars of the GREMI group have tried to extend this territorial model to other sectors like culture (Costa, 2001) and tourism (Peyrache-Gadeau, 2003).

This last contribute analyses two type of sky-stations: the "territory-station" of tourist economy and the "place-station" of tourist production. The first station is characterized by the presence of a spontaneous local milieu. In this place innovations

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[4] Porter, M.E. 1998, p.77.
[5] Strict translation: innovating environment;

diffuse smoothly and organizations emerge as continuities. In the second stations there is not a milieu innovateur, the actor has an exogenous origin and the development is only based on narrow tourist activities. In the paper is explained how important is the role of the local community and of the relationships among the local actors differing from the porterian cluster.

In the definition of ID, as we stress further, the local social system is an integral part of the local system itself. In the next paragraph an ID extension is applied to TTI maintaining the two advantages of the territorial models proposed: the network of actors from the porterian cluster and the social environment form the milieu approach.

4. Tourist District and tourist CLuster: a proposal

In this section we introduce and discuss a new concept: the tourist district. In particular we extend logical features of the industrial districts theory to TTI. We propose a more embedded model related to the industrial district approach of Becattini (2000) to non-industrial local systems.

Becattini defined the industrial district as a:

"*[…] socio-territorial entity which is characterised by the active presence of both a community of people and a population of firms in one naturally and historically bounded area. In the district, unlike in other environments, such as the manufacturing towns, community and firms tend to merge*" (Becattini, 2000).

In this definition, as already stressed, the local social system is an integral part of the industrial district itself.

Recently an important debate has emerged on industrial territorial models extended to other fields, in particular cultural industries (cultural district, Lazzeretti, 2003). District may be an interpreting key of a local system as a SME cluster embedded on the social community in a territory.

Following the approach of Lazzeretti (2003) the district represents a system characterized by the presence, in its territory, of:

- A large endowment of artistic, natural and cultural resources: Cultural, Artistic and Natural Heritage (CANH).

- A network of economic, non economic and institutional actors who are specialized in tourism activities;

First of all, this heritage is the basis of a competitive tourist attraction and if enhanced and preserved, it is able to create a competitive sustainable advantage and it may be a flywheel of development for the local community. Regions and European places, undoubtedly, are characterized by the presence of Artistic Cultural and Natural Heritage (CANH, Lazzeretti, 2003). This heritage is the basis of a competitive tourist attraction and if enhanced and preserved, it is able to create a competitive sustainable advantage.

Regarding the networks of actors, in the Industrial districts literature, there are two main pillars at the base of an ID:

- The productive organization; the system of enterprises localized and specialized, work with a flexible division of labour;
- The social and institutional local environment;

Thanks to these last two elements the district is an auto-reproductive model of local development. We propose therefore an integration of the two approaches: district and cluster approach as depicted in Figure 1.

Figure 1: Relation between the porterian cluster and the marshallian-becattinian Industrial District .
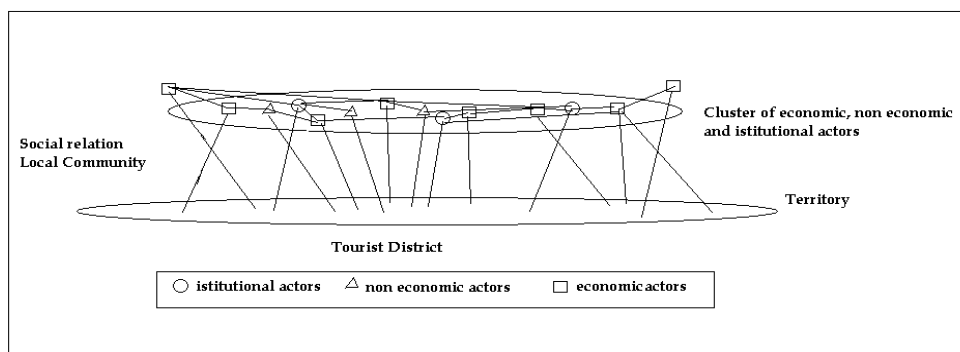
Source: our elaboration;

A first approximation of a tourist district is a group of SMEs generates wealth and employment enhancing tourist resources. In figure 1, we show how a cluster of small

and medium enterprises of economic, non-economic and institutional actors is a condition *sine qua non* of a tourist district.

A tourist cluster is then *a geographic concentration of interconnected companies and institutions in tourism activities*. It includes suppliers, services, governments, institutions, competitors, and universities. First of all, we verify the presence of a cluster of specialized enterprises of small and medium dimension that creates wealth and employment through the connection with the resources of the territory (CANH). The cluster of enterprises will be composed by hotel, travel agency, catering firms and other firms related to the tourist business in wide sense.

In other words, three conditions has to be tested:
– verify the presence of a consistent number of enterprises enhances the cultural, artistic and natural heritage in a tourist destination (tourism related activity);
– verify the set of enterprises composes a cluster of SMEs localized in the tourist destination;
– verify the presence of a set of economic and social relationships between the social local community (citizens) and the productive community (enterprises).

After this premises, following the approach of Bellandi (2003) we extend the industrial district features to the tourist district.
• A tourist district is, first of all, a place where the social community and the economic community live (TTWAs);
• TTI is the core industry that develops all the wealth generating activities in the tourist destination. There will be, then, other activities as "auxiliaries";
• Property and roduction process are mainly inside the district. The CANH embed the consumption process in the area;
• The filiere is subdivided in the area and SMEs are specialized in one or more "phase of the production process" supplying the experience to tourist;
• Trust and informal communication have an important role among the local actors in the transaction and in collaboration activities;

5. TOURIST LOCAL LABOUR SYSTEMS

In this paragraph, an empirical analysis of the Italian territory is performed in order to verify a strong concentration of tourist SMEs as a specialized cluster.

The first step related to the concrete identification of a theoretical concept is to define measures and the weights. Also industrial district theory, in its history, has always faced the difficulties of quantitative analysis.

The industrial district surpasses the administrative borders and in the reality it is composed by a group of municipalities. In this background, the efforts of the first scholars were to give a territorial acknowledgment to a concept that with the territory was strictly related and it may not prescind.

In order to identify in the territory industrial districts, the methodology was the following: the national territory, examined in first approximation in Tuscany (IRPET-Institute of research) was subdivided in territorial units: travel to work areas (TTWAs) (Smart, 1974, Combees et alii, 1982), which interprets the daily commuting flows due to work reasons defined in Italy by the ISTAT on the 1991 Census on Industries and Services.

Therefore, the analysis identified a "*thickening of socio-economic relations among the various members of the local society, to favor the formation, the spread and the maintenance of a system of values, productive acquaintances, typical behaviors and institutions through which the local society interacts with the productive organization*"[6] (Becattini, 2000).

The TTWAs emerged as a big city, a rural system in relation of the specialized production.

The question about every day movement for study or job reasons was introduced by ISTAT in 1971, but it only caught up a consisting analytical value in 1991, thanks to a geographical information system and to the possibility to use a greater number of geographical data.

With such methodology, the national territory was subdivided through criterias inspired by the district theory. Later on, through the application of location quotients (LQ) to the TTWAs, a map of industrial district was proposed (ISTAT-SFORZI, 1997).

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[6] Our translation.

The driving concept was to identify a concentration of productive activities and services in such amounts to offer jobs opportunities to the wider part of the residential population. The concept was then called *auto-containment*[7].

This indicated for a territory *"its ability to comprise in it the bigger amount of human relations that take part between the places where the production activity is carried out and the places where the social reproduction are based"* (ISTAT-SFORZI, 1997).

A territory of this type was called *labour local system* or *travel to work areas* "a socio-economic entity that includes occupation, purchases, recreation, and social opportunity ... given a residential base and the necessity of coming back at the end of the days" (*ibidem*).

ISTAT (1997) identified 784 TTWAs in the Italian territory. The 784 TTWAs were the result from the aggregation of the daily commuting flows of the 8100 Italian municipalities of the 1991 Census.

After this brief review, in our opinion, this geographical methodology is suitable also for local system characterized by the presence of a cluster of SMEs working on tourist activities. In fact, the final object of our analysis, the tourist district is a place where persons share experiences of life and job with a sure stability in the time: a local system.

In the next paragraphs we will try to apply a LQ to the TTWAs constituted by the census of 1991. Although the TTWAs was defined ten years ago, we think that the undeniable evolution of a local system is pretty durable and we can use the Census 1991 in order to underline a concentration of tourist clusters. Moreover, we think social life and socio-economic relations are pretty steady in the time.

This empirical suggestion may be a first approximation of empirical recognition of local systems characterizes by tourist business.

Moreover, the possibility to use TTWAs is valid at the moment only for the constructed local systems with the census of 1991[8].

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[7] *autocontenimento*
[8] The new TTWAs based on the 2001 Census will be identified at the end of 2004.

The methodology of location of the Industrial Districts (ISTAT-SFORZI, 1997) assumes as territorial unit of analysis the TTWAs and previews the following stages:

1) Identification of manufacturing local systems;

2) Identification of manufacturing local systems that are mainly constituted by small and medium enterprise (SMEs);

3) Identification of the main industry of every local system of SMEs;

4) Identification (as Industrial Districts) of the manufacturing local systems that are mainly composed by SMEs whose main industry is constituted from SMEs.

The aim of the paper is to identify those local systems that have a concentration of enterprises specialized on the TTI in comparison to the average national, and then to identify if it is a cluster of SMEs as defined.

The first issue is to define what belong to the tourism field of activity and what is not tourism. We can use a broad definition of tourism or a narrow definition. For instance, we can include in the analysis only hotel, campings, accommodation facilities, travel agencies or also those indirectly connected like transports, recreational activities and rent automobiles, or include also bars, restaurants, coffees, that are connected to the normal life of all the places.

As a methodological simplification, we will adopt in this operation the definition of the ISTAT of activity connected to the tourism, through code ATECO of the H voice: Hotel, Restaurants and Cafes. The voice, H, Hotel and Restaurants, described in the below table, is recognized as the HO.RE.CA. sector.

Table 1. Voice H: Ho.Re.Ca. sector.

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55.11.0 Hotel and motel, with restaurant
55.12.0 Hotel and motel, without restaurant
55.21.1 Hostels
55.21.2 Mountain shelters
55.22.0 Campings and areas equipped for roulottes
55.23.1 Tourist Villages
55.23.2 Colonies, houses and houses of rest (without medical cures)
55.23.3 Wagons lits
55.23.4 Landlord for short stays, houses for vacations
55.23.5 Farm holidays - Agriturismos
55.23.6 Other complementary accommodation exercises (comprised residences)
55.30.1 Restaurants, eating house, taverns and Pubs with kitchen
55.30.2 Take away, pizzerie
55.30.3 Management of wagons restaurant
55.30.4 Services of restoration in self-service
55.30.5 Restaurants with annexed entertainment and show
55.40.1 Bars and cafes
55.40.2 Milk-bars
55.40.3 Winery and wine cellars
55.40.4 Bars, coffee with entertainment and shows
55.51.0 Cafeterias
55.52.0 Caterings
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Source: ATECO 91 (ISTAT, 1991);

Also OECD (OECD, 1990) recognizes workforce in the TTI pertaining to three main pillars. Referring to international classification ISIC two digits, OECD classifies the activities connected to the tourism in:

– 55 hotels, restaurant and cafes;

– 60-63 transport and travel;

– 92 recreational, cultural and sporting activities (market and not market services);

Naturally, all the created workplaces in these industries can not be attributed to tourism. Anyways, OECD refers, mostly, to the HORECA sector (hotel, restaurant, cafes) in analyzing the territorial employment in the European Community, as it is directly connected to tourism instead of the other two categories.

We think that this simplification can be suitable and this analysis can individuate tourist local systems specialized in a broader tourist activities definition. In other words, we expect a stronger specialization in these activities in tourist local systems.

ISTAT collects these data in the "Intermediate Census of the Industry and Trade" of 1996 for every municipality: the smaller unit of analysis available. These data can be, therefore clustered for the TTWAs on the census of 1991, as described in the previous pages.

The successive step has been to apply the indices of territorial concentration to the 8100 (approximately) municipalities of Italy, combined in TTWAs.

These are the used LQs of tourist concentration:

1. Tourist Local systems: this first LQ evidences those TTWAs that have a strong specialization on tourist activities:

$$\mathbf{LQ}_{T,sl} = \frac{[E_{T(sl)}/E_{(sl)}]}{[E_{T(I)}/E_{(I)}]} > 1,000$$

where:
- $E_{T(sl)}$ indicates the number of employees in local units in the local system specialized in the voice H of Ateco 91.
- $E_{T(sl)}$ indicates the number of employees in local units in the local system;
- $E_{T(I)}$ indicates the number of employees in local units in Italy specialized in the voice H of Ateco 91;
- $E_{(I)}$ indicates the number employees in local units in the local system.

This LQ indicates the concentration in the TTWAs of tourist activities (voice H Ateco'91) in comparison with the national average.

2. Local systems composed of SMEs: this LQ indicates those local systems that are characterized mainly of SMEs with a number of employees under 250.

$$\mathbf{LQ}_{250,T(sl)} = \frac{[E_{250,T(sl)}/E_{(sl)}]}{[E_{250,T(I)}/E_{(I)}]} > 1,000$$

where these variables are the same of the previous LQ but calculated in local units with less than 250 employees.

The second LQ is not presented in the results because it goes from the national average up to 1.05. It means that there are no TTWAs that have a percentage of SMEs below 95% in tourist activities. More information is presented in the next section.

The first $LQ_{T,s1}$ indicates those local systems that are more characterized of SMEs in comparisons with the national average. In particular, if the value of the $LQ_{T,s1}$ is more than 1 for a local systems a concentration level over the national average. Moreover, regarding the representation of the $LQ_{T,s1}$ we adopt a fix scheme with defined classes, in order to interpret easier the results.

In particular, these are the defined classes: [0-1), [1-1.5), [1.5-3) and above 3. These classes define particular concentration levels, for instance [1-1.5) identify concentrations levels between national average and 50% more than the national value.

The proposed map, constructed with the $LQ_{T,s1}$, individuates roughly 300 tourist local systems with a $LQ_{T,s1}$ more than a unit. The $LQ_{T,s1}$ values go from below the national average to 12 (12 times more than the national average individuated in the darkest spots).

Map 1 : Tourist Local Systems in Italy;
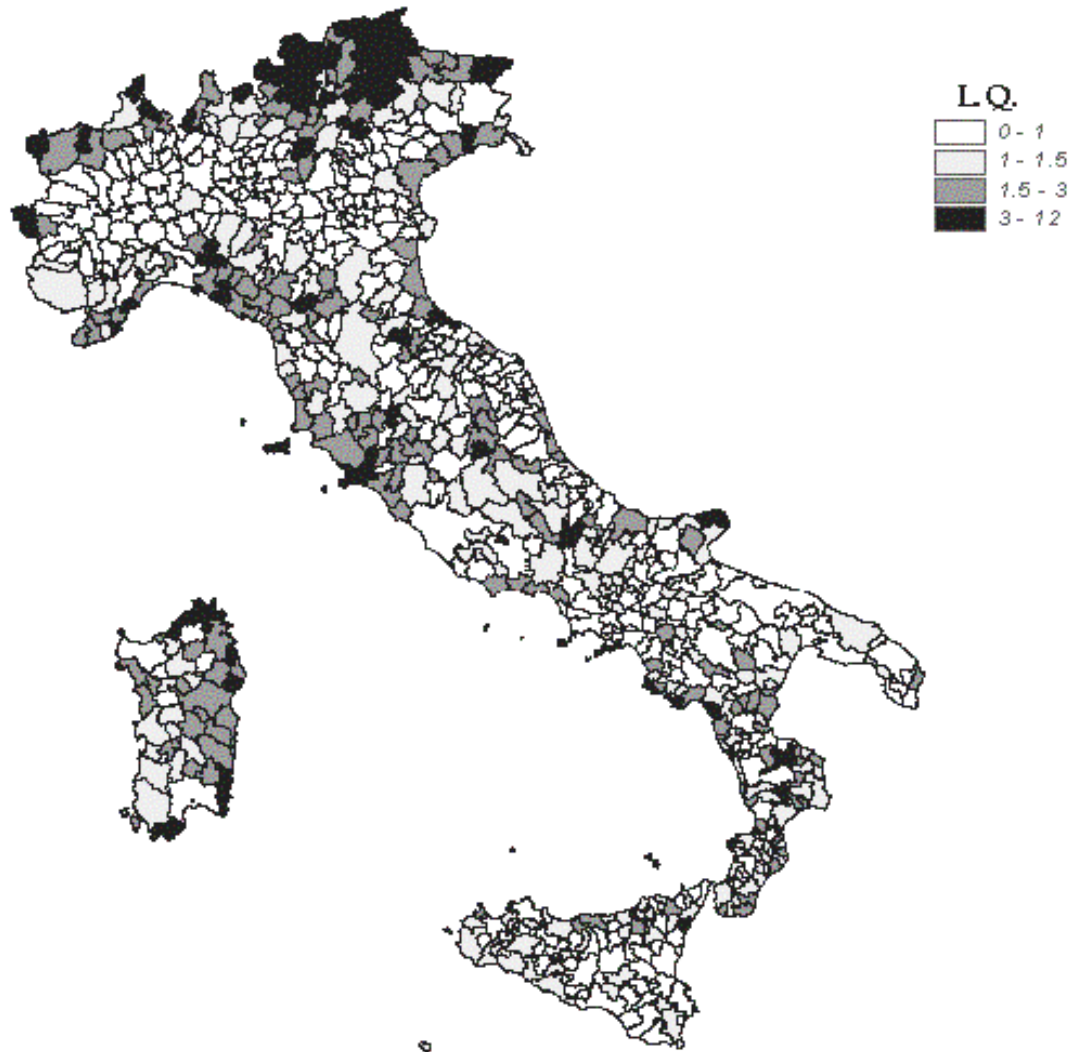
Source: our elaboration;

6. CONCLUSIONS

The map individuates roughly 300 tourist local systems (TLS) with a $LQ_{T,s1}$ more than a unit. The $LQ_{T,s1}$ values go from national average to 12.

The 300 TLS has in average 8 employees therefore they are mainly characterized by small enterprises. The TTWAs are heterogeneous and present tourist destinations as "sea, sand and sun", "snow and sky" and "lakes".

The whole Italy is recorded but in the north there is higher LQ value. The coast has a high rate but the highest LQs are recorder in mountains localities.

Arts Cities have $LQ_{T,s1}$ values below the most specialized local systems. For instance, Florence, Rome and Venice have a $LQ_{T,s1}$ equal to 2. This is because the $LQ_{T,s1}$ recognizes a strong specialization only in one activity and on the supply side. In the big cities there is often a diversification of industries so the TTI weight less than in only "tourist place".

Moreover, the top 25 TTWAs have a percentage of employees more than 41% on voice H, with a peak of 60% in the "snow and sky" TTWAs. 90% of enterprises have less than 20 employees.

The results of the analysis point out that this methodology is applicable to TTI. The TLS recorded are a first approximation of a tourist cluster.

As shown, TLS are strongly specialized in TTI as their core industry. Local units are localized inside the TTWAs. Moreover, a need of focus on the relationships on social community and productive environment emerges.

A next step is to describe the filiere of TTI and calculate LQs for each phases of the production process, in order to propose a taxonomy of TLS. Evidences proposed are only a first step toward the 'tourist district' and toward a qualitative analysis on particular cases.

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