TF FINAL DOCUMENT ON "SUSTAINABLE TOURISM"

TOURISM IN THE ALPS: GOVERNING SUSTAINABILITY

The starting point

Although obvious, it is important to start by saying that tourism is the necessary condition to speak of "sustainable tourism" in Alpine resorts. Otherwise, we may discuss the sustainability of other factors, but not of "sustainable tourism".

Taking for granted that tourism is an economic activity, it follows that the goal of tourism is market competitiveness and thus its economic value. It is therefore necessary to first understand the role of sustainability in this context. In brief, it can be stated that sustainability is the necessary but not sufficient condition to ensure the competitiveness of a strategy on the medium-long term. This is true also in terms of the costs needed to manage externalities and conflicts.

Without sustainability, competitiveness is illusory!

The core reference

In contrast to other tourist areas, the concept of "tourist destination" is central and essential when talking about sustainability in the Alpine area. An Alpine tourist destination is tightly connected to a specific living context, characterized by the presence of a specific community.

"The Alpine tourist destination is the living context of a local community, and becomes the context which tourists experience".

Such context is built by four components: nature, history/culture, social model, economic activities. These are the tourism resources of the resort; in other words, the product that is put on the market. It is important to highlight that, when this approach is adopted, the proposed model of Alpine destination is characterized by the presence of an existing community (*Community Model*). The vast majority of destinations in the Alps match this model, however different destinations also exist (such as the *Corporate Model*). In France, for instance, there are fully "artificial" 3rd and 4th generation Alpine tourist destinations: they were built in uninhabited areas, and tourism-related business activities later built the life model. However, the belief that the typical type of destination (the community model) is a significant competitive advantage of the Alps (lifestyle, cultural heritage, social models) versus other contexts (US, Japan, emerging countries) has become stronger and stronger. It thus takes on a central role in the governance of sustainable competitiveness (or competitive sustainability), but should not be taken for granted.

The consequence is that the tourism product is the destination as a whole, the unique combination of the elements of its identity, rather than a single structure or infrastructure. Such an approach has significant implications, both in terms of competitiveness and, at the same time, of sustainability. The first and most immediate one is the fundamental role that the system of the "networks of relations": between the public and private sectors, among the various tourism and business operators, between these and citizens, and finally

between the local community and tourists. It is thanks to these that tourists can really live their aspiration and expectation: turning their holiday into a positive life experience.

Role of the local community

The whole local community becomes the main player of tourism in its territory. The elements which define the identity of its tourism offer – and differentiate it from other tourism products available on the market – are "owned" by the entire community. However, a community is not a homogeneous group, but rather a varied combination of different segments. Each one has its own specific interests and needs, and therefore perspectives: local administrators (the public body), tourism operators, other business operators, as well as free and spontaneous environmental, cultural, sports associations, etc.

When these different approaches turn into conflicts, sustainability becomes a utopia. It is always necessary to remember that diversities are not the symptom of a problem, but rather a source of value – provided that all different and equally legitimate needs are channelled into a shared space.

"*In tourism, nobody, alone, is right over others*": neither the public sector on its own, nor the private one.

In order to fully play its role in tourism, the entire local community – with all its various components – cannot be in (clear or hidden) conflict with tourists. The existence of an "ill-concealed dislike" of tourism among residents who do not work in tourism is quite common. The tendency is to only see the disadvantages of the presence of tourists (especially if large), such as the general increase in prices, traffic jams, longer times to buy goods and/or services, various forms of pollution. This happens when no active effort has been made to explain the benefits of tourism to the community at large, rather than to those who work in tourism only. Better services and structures (for sports activities or other events) which – without the motivation of tourism – are not affordable for a small number of people become available, thus enriching the offer for tourist and benefiting residents alike. More importantly, it should be noted that the presence of tourists improves the reputation of a destination, which would otherwise be limited to a very small space. It is now known that a destination with a better image and reputation translates into higher profitability for the economic activities which it hosts, as well as greater attractiveness for investments, both local and from outside.

Sustainability as balance

In this context, the goal of sustainability becomes striking a balance between different needs: economic development, environmental protection, local governance, promotion of historical and cultural identities, creation of opportunities for social growth. *Sustainability as balance*.

What is meant here is a comprehensive balance between all the components of tourism and the resources-identities of a destination. At times, emphasis has been put mainly on environmental sustainability, but we should not underestimate the damages caused by an inaccurate evaluation of economic sustainability, especially – but not only - in case of public investments and funding.

The current tendency is to demonstrate the environmental sustainability of projects (more or less successfully), however often taking economic sustainability for granted , especially when a project is not only developed by private players, who need public measures or contributions. If economic sustainability is not assessed and reasonably expected, the following damage ends up being very serious: environmental sacrifices are made without obtaining the economic and employment benefits which supported the project. This practice is more

widespread than it may seem. The time has probably come to put severe constraints on the submission of economic sustainability projects, possibly defining the criteria they should comply with.

Competitiveness in mountain tourism is strictly related to its sustainability, as the quality of tourist destinations largely depends on their natural and cultural environment and the integration in a local community. The sustainability of tourism involves various aspects: responsible use of natural resources, assessment of the environmental impact of activities, use of "clean" sources of energy, protection of the existing heritage, safeguard of the natural and cultural integrity of tourist destinations, quality and duration of the created jobs, local economic repercussions and quality of receptions facilities. These are not just statements or goals to be achieved, but actual challenges which require that responsibilities are taken on and smart decisions are made on the basis of useful information.
The section on the monitoring and control of the impacts caused by measures taken to adopt a strategic process to promote a destination contains some tools (indicators) which can be very useful to this purpose.

Sustainability must involve all the resources of a community, or else cannot be achieved. The coexistence of environmental, cultural, social and economic sustainability aspects is the essential condition to ensure that tourism policies are effective.

Territorial balance

It is a fact that tourist areas are structured around "hubs". In other words, tourism does not involve the Alpine territory in a uniform way – and this is true for entire regions too. This led to the creation of more marginal areas which do not fully benefit from the flows and advantages of tourism. And even where tourism does exist, different places are at different stages of their lifecycles as tourist destinations, have a different market positioning and different business backgrounds. Unbalances among different areas in the same territory are particular relevant, as they may cause possible conflicts or residents leaving the area. The role of so-called "strong resorts", with a positive and consolidated reputation on the market and among tourists, is essential to attract flows of visitors to the region (considering that nobody chooses something they do not know exists). However, their function cannot and should not be that of "absorbing" all tourism, but rather "irradiating" it: they should be starting point to get to know and promote the surrounding territory.

Plans for territorial cooperation which try to achieve this goal should be promoted in all possible ways.

A path that should be monitored

Tourism in the Alps has a great history to tell and the *adoption of periodic monitoring tools* can help tourist destination tell their story in an even more convincing way.

This is how the tourism industry can identify areas for improvement, develop reference parameters to measure results and effectively implement its strategy for sustainable competitiveness. By measuring its results, tourism can secure a key role in the green economy of a world with more and more limited resources. When it comes to smaller destinations, it may seem complex to apply monitoring policies and methods. However, their administrators should be interested in using indicators which can be useful to define priorities, motivate economic players (in tourism, agriculture, handcrafts, etc.), involve local communities and offer a better experience to visitors. Often, small Alpine destinations are not included in structured offers which focus on the main types of summer and winter tourism. They could aim at becoming attractive/interesting for 12 months a year, and they can be. Of course, the presence of "living" communities 12 months a year, a rich cultural offer throughout the year and appropriate reception facilities – without distorting their culture and lifestyle –

are the necessary prerequisites to achieve this goal. To this purpose, it is important that a good relationship among institutions and between the private sector and institutions develops, accompanied by a strong participation of individuals and a widespread awareness that everyone is responsible for managing and planning the territory/landscape and governing the community (i.e. "taking care" of the community"), as this will also ensure the quality of life of future generations.

Towards a tourism of values

In addition to these considerations, another one is particularly important: achieving the competitive sustainability of a tourist destination cannot rely mainly – let alone exclusively – on constraints and limitations, although this kind of rules are certainly important in specific situations. It is necessary to implement, at the same time, a series of initiatives to develop a *culture of values*: the value of each and single elements which build the identity of a local community, regardless of whether they are a productive resource. When the culture of values is shared by people, then the goal of building a "hierarchy" of references (or preferences) which guide individual choices will have been achieved.

This means working to develop a type of *tourism in Alps which is really based on values*, not just from the perspective of the offer, but also in terms of the demands and behaviours of tourists.

CHANGES IN TOURISM DEMAND AND IMPLICATIONS FOR ALPINE RESORTS

Background

It is an accepted fact that tourist flows to mountain areas have significantly declined in recent years. This is caused by a combination of factors. In the last decades, many winters have had scarce snowfall (with the exception of the last two years, in particular 2013-2014). In general, the influence of climate change has been perceived, with an increase of average temperatures.
The economic crisis has played an essential role, especially on domestic demand. For instance, Italian Alpine resorts – with the exception of Trentino-South Tyrol – mainly attract Italian tourists. They often choose the Alps for their second holiday during the year, which is it is the first to be given up at times of economic contraction. The trend towards a reduction of the length of stay has clearly continued: mountain holidays, both in summer and winter, are more and more often short ones. Stays tend to be motivated by specific reasons, linked to sport of the recreational needs of those who lead an active life, or to other ways of enjoying leisure time.

The evolution of behaviours and motivations

What is relatively new in the last decade is the *multiplication and diversification of the reasons* behind a holiday to the mountains; this is true both in summer and winter. A recent research carried out by CeSTIT of Università di Bergamo for Ersaf – Regione Lombardia shows that only 52% of those who carry out sport activities in the mountains do traditional trekking for more than 4 hours a day, while other activities are more and more popular. In particular, Mountain Biking (MTB) represents 24% of the activities carried out. The same is observed in winter: downhill skiing accounts for about 50% of sport activities on the snow, while the use of snowshoes (22%), snowboard and off-piste skiing are gaining popularity. Some ski resorts have even decided to offer the opportunity to ski on fresh snow with the support of mountain guides and away from any risk of possible avalanches. In addition to lovers of outdoor activities, Alpine destinations also attract tourists who are less active, but equally fond of various activities. Four main interests emerge: shopping, food and wine, local culture and wellbeing/relaxation.

Observers of International tourism demands highlight some fundamental trends which affect the management strategies and policies of tourist destinations:

- ✓ Higher mobility of tourists
- ✓ Fragmentation of holiday times and shorter stays;
- ✓ Demand to live among local residents;
- ✓ More individuality and autonomous organization of holidays by tourists;
- ✓ Multiplication of niches and tourism needs which cross age groups;
- ✓ Tendency to take into greater account ecological and environmental aspects when choosing a holiday destination;
- ✓ New appreciation of the historical memory and therefore of the cultural and artistic nature of tourism;
- ✓ Growth of tourism towards little known destinations.

Consumption changes among tourists in the Alps

When talking more specifically about the Alpine context, these trends are accompanied by changes in consumption behaviours. These highlight opportunities to re-launch or consolidate the tourism offering of

mountain resorts, even "small" or "minor" ones. Some of these trends – such as the diversified consumption, the search for simplicity, neo-traditionalism – can be satisfactorily met by the "Alps system" and its tourism industry.

Customized consumption, the desire to feel unique protagonists, behaviours which involve a more complex relationship between territory and visitors, also present interesting opportunities for the Alps. Mountains, in the wider sense of the term, convey and offer experiences which go beyond standard life; they communicate strong feelings and offer activities which make guests feel they "belong" to the territory. They have the chance to experience a direct contact, a "dialogue" with the environment and the resident population, especially in the case of summer tourism.

It is ever more necessary that mountain tourism defines clear development criteria to make the right choices – beyond incidental events – for each individual area, depending on their vocations.

Implications for policies on tourism offering

This evolution of demand – as it always happens – raises questions which can significantly affect the identity of Alpine destinations as tourist resorts, as well as the implications for land management and therefore environmental and cultural sustainability.

The most significant aspect is that the proliferation of motivations behind a holiday in the Alps forces larger destinations to offer a very wide range of services and activities. The satisfaction of tourists depends on the opportunity to find an articulated and diversified organization that allows them to choose how to spend their free time among the most varied activities, often with no continuity and with the ever more frequent habit of *zapping*, where people feel and emotion and soon abandon it to move on to the next experience. An extreme but rather enlightening example of this tendency: more than one important winter ski resort now offers tourists the opportunity to ski and reach Alpine lakes, which they will be able to explore with the appropriate diving equipment. This may be an "extreme" example, but it shows how even simple needs must be met by a wide variety of services and that, as a consequence, competitiveness also depends on the ability of major resorts to ensure such varied offer.

Even if in most cases a heavy development of infrastructures, it takes effective organization and a variety of significant human and financial resources to provide this type of offer, which only "large" resorts can ensure.

Against this background, the quality of the environment and, more generally, of "wellbeing" takes on a particular relevance. Recent surveys agree in showing that the "beauty of landscape" is the main attraction of a mountain holiday, closely followed by the "sense of freedom". Doing sports in the mountains also seems to be mainly appreciated because of the pleasure of being surrounded by beauty than by fun itself. This shows a still very strong relevance of landscape and the environment, despite the once non-existing competition from completely new tourist destinations (atolls, deserts, small, little known islands, etc.).

"Small" destinations

The consequence is that small resorts, which are very common in all the Alpine regions, are now facing the particularly fierce competition of the most equipped and resource-rich resorts, which are also usually located at higher altitudes.

So far, tourism policies have basically tried to "chase" the development of major resorts, building infrastructure (ski facilities, scope and hotels). But it has now become clear that this strategy is a losing one,

given that the limited (not only financial) resources would not allow to work on different aspects and reach the required quality to meet the needs of the very demanding tourists of today.

In terms of prices, small resorts suffer from rather obvious diseconomies which certainly do not allow to compensate for the lower quality or more limited range of services. It is ever clearer that the race to create larger ski areas (observed in the Alps and especially in the Prealps), in the belief that it is the only condition to survive, is often destined not to give adequate benefits.

In this context, smaller resorts should rather identify their peculiarity or special characteristic to express a uniqueness (Unique Selling Proposition - USP) which can make them competitive against major destinations. This is not a new process in corporate business – let alone in the tourism industry – but it is certainly new for the offer of Alpine destinations which have so far offered the same product (landscape in summer and ski in winter). There are significant examples which confirm this: Alpine resorts which 15 years ago seemed to be on the verge of disappearing have found new energy in the markets they are now targeting and where they are appreciated. The most frequent case is that of resorts for families and children, but others are mainly targeted at a young audience and offer spaces, activities, events and music for this public. Unexpected success has also been gained by tourist resorts in the Prealps, thanks to the almost exclusive relationship with the nearby (metropolitan).

Implications for sustainability

In terms of sustainability of tourism in the Alpine areas, two significant aspects have to be taken into account. They are also related to the considerations made on the changing trends described so far.

The first has to do to with the decreasing popularity of downhill skiing, which however is still the most widespread activity carried out by tourists in winter. The more other ways of enjoying the mountains in winter gain ground (snowshoes, for instance), the less ski lifts will be used. By the way, the technological developments of these infrastructures promote the dismantling of small units (traditional ski lifts) and the use of larger and more effective structures. The environment certainly benefits from this, as these have a lower environmental impact.

The second is a consequence of the diversification of summer and winter activities. Although some require the presence of ski lifts (think of downhill skiing: the Dolomiti Supersummer Card, for instance, allows holders to use the ski lifts and cableways in summer to do mountain biking), most do not need relevant infrastructures, but rather:

- ✓ Innovation in the design of services;
- ✓ Great attention to customers' expectations;
- ✓ Integrations with other services.

All of this gives the opportunity to promote aspects of the mountains which had been ignored or underestimated in the past, and which can be exploited even in destinations located at medium altitudes.

Integration of resources

The first resource is certainly the identity of a territory, a peculiar and easily recognizable feature of mountain areas, which is expressed at different levels.

In the food and wine sector, most Alpine areas have reached a good quality level, thanks also to their typical products, but this cannot be said for many other fields which could be better promoted and exploited.

The way of living, working and organizing spaces are usually seen as mere memories of the past and can be explored in small, local, low quality museums which do not adequately raise the tourists' attention.

A second resource is represented by the artistic and cultural heritage, which mountain areas do not lack, bur are rarely a factor which attracts tourists. How often is a mountain holiday suggested for cultural reasons? Churches, paintings, castles and palaces, buildings and villages are usually experienced as part of the landscape and rarely become the destination of a visit, if not to fill a day of bad weather. Mountains which host older and less active tourists can better exploit this resource.

The new motivations behind different activities, practices and uses (let's just think of the role that Christmas markets have in the tourism industry of some Alpine destinations) facilitate a multidimensional relationship with mountain tourism. In this context, most destinations can find their individual way of expressing their nature and the best offer for tourists.

However, this raises two not-renounceable needs which define the competitive conditions of a destination: on the one hand, the ability to effectively promote and communicate its tourism product, on the other, the ability to govern a territory beyond its limited local dimension.

CHANGING DEMANDS AND THE MARKETING IMPLICATIONS FOR TOURISM IN THE ALPS

Information and Communication Technologies (ICT)

Tourists have recently changed their way of accessing information. They have started moving with different logics when choosing a destination.

When choosing "where" to spend a holiday, the Web has now become decisive. The Web does not just mean Internet websites, but also dedicated and general social media, Web portals (such as Tripadvisor, Expedia, etc.), dedicated blogs, etc. Having the right positioning on these channels now makes the difference. It is like being constantly on show at a large virtual tourism exhibition. Changes in demand necessarily imply changes in reception facilities: they are now extraordinarily varied and range from 7-star luxury hotel to holiday houses, Alpine chalets and pasture huts and even tree houses.

SMM (Social media Marketing), mobile technologies, SEO (Search Engine Optimization), SEM (Search Engine Marketing), GDS (Global Distribution Systems) and IDS (Internet Distribution Systems) are more and more significant tools of Travel 2.0 and the market. They should be looked at with great interest, given the potential for development that they imply.

What really matters to tourists is living an unforgettable holiday experience. Going on holiday is strongly characterized by emotional social, cognitive, motivational components, and thus opens up a space to observe the psychology of individuals.

Knowing the tourist

To attract the attention of a potential tourist, it is necessary to play on the knowledge of two specific factors: expectations and motivations.

The expectations that someone has before going on holiday have always had a significant role. As they are strictly connected to the idea and image that someone has of a place, the power of evocation is very important when making a decision. In addition to how people may imagine the place where they are going, it is also necessary to know how they imagine themselves in that place. The expectation of a journey does not only include the tour package that someone is about to buy, but also the image of themselves that they have decided to experiment with. By analysing how people see themselves on holiday, it is possible to easily go back to the expectations they have built, and therefore to the type of experience that they have decided to try.

The reasons behind a choice can be individual, interpersonal or social. Usually:

- ✓ The first meet the need to relax, evade and escape;
- ✓ The second attempt at strengthening personal relationships;
- ✓ The third try to build prestige and meet the desire to know.

Managing experiences

Today's tourists – or rather travellers - want to make their own choices and become the subjects, rather than mere recipients, of a final offer. But they still expert professionalism and kindness, they have higher living standards than in the past, and do not give them up, even if on holiday. If they decide to, it is just because they come across an attractive and convincing offer, which makes up for what they have given up.

Each visitor must be offered a system, a territory, which can give:

- ✓ Tradition (with festivals, typical products, food and wine, handicrafts), as well as innovation (unique events, which characterise a place and cannot be replicated elsewhere);
- ✓ Fruition (everybody must have the chance to go, see, experiment with no logistical constraints or barriers);
- ✓ A souvenir: gadgets, objects which will tell the experience of those places and renew memories over time.

"We do not travel to travel, but to have travelled" (Alphonse Karr)

Market changes

Today's and tomorrow's tourists come less and less from Italy, and more often from foreign countries. This means adapting to their needs.

In a tourism market such as that of the Alps, tourist flows are characterised by virtually no change in the total number or visitors, but also by a progressive loss of attractiveness and competitiveness, if you look at its share of the global tourism market. What is happening is a redistribution of flows among the different destinations in the Alps, and therefore increased competition among them. The consequence is a tendency to implement strategies and initiatives to diversify each destination from others, at least in some respects. In some cases, this turns into an actual race to be the first to come up with an idea which launches a "tourism trend".

In a market which is more and more influenced by technologies comparing offers from various parts of the world in real time, it is necessary to adapt to the changing consumption behaviours in world tourism. An essential remark: at all levels of tourism, more attention is now paid to the total budget of a holiday.

In a context where demands and the market are changing, it becomes unavoidable to adopt a marketing approach centred around the tourist's experience, rather than products alone. This means:

- ✓ More attention paid to the customer/guest
- ✓ Adapting current products to the development of new tourism products
- ✓ Taking into account the potentials of the Web. Social media lead to a slow, organic and lasting growth of content visibility and brand awareness;
- ✓ Focusing on the "quality of experience" and developing a care for details.

The necessary and unavoidable condition is that all public and private players work as a system.
In tourism, nobody, alone, is right over others.

DESTINATION MANAGEMENT, WITH SPECIFIC REFERENCE TO "SMALL" TOURIST DESTINATIONS

Introduction

In some areas, mountain tourism has represented a fundamental economic activity which has prevented (at least in part) depopulation and ensured work and income opportunities for the local population. After the boom in the '60's and 70's, a phase of stagnation –if not crisis – has gradually began, both because of exogenous causes related to social, cultural and climate changes, and endogenous ones, mainly the delay with which destinations have often interpreted the changes in demand and implemented the necessary strategies to remain competitive and visible.

Given the fiercer and fiercer competition on the market of tourism, Alpine regions – and especially "small" tourist resorts – must first think about how their offer can be implemented and adapted to the current needs of customers, emphasizing at the same time the vocations and peculiarities of local territories. As tourism in the Alps has always been mainly based on the offer of existing primary resources, to preserve future tourism it is clearly necessary not to harm this intrinsically fragile environment, which is a value to preserve and a resource to use at the same time. Although each place is a different stage in its lifecycle as a tourist destination, we believe that the Alps in general should focus their efforts on promoting more "experiential" tourism offering, rather than aiming for mere quantitative growth.

The Alpine Convention, with its Tourism protocol (which would benefit from an update/review), is an important reference for the implementation of tourism sustainable policies in the Alps, taking into account environmental, cultural, social and economic aspects. The Protocol highlights some challenges which involve all sectors: developing innovation and improving the management skills of the players of Alpine tourism; increasing regional wellbeing through cooperation between tourism and other sectors; making consumers aware of the advantages offered by sustainable tourism.

Some general considerations

Identifying the peculiarity of a destination does not mean giving up all other products: they will still be offered, but will not have strategic priority in the management of the resort, which of course has repercussions on the allocation of resources and investments. When a "small" Alpine destination takes on the challenge to identify its distinguishing characteristic and invests in the market of goal-tourism, it must first think of the *quality and organizational efficiency* with which its product is offered and the ways it is communicated to the market.

Small tourist destinations are not always quality and efficiency oriented, for obvious reasons: managerial culture is weaker, and they have more limited human and financial resources. It is therefore necessary to gather new knowledge and experience, with the contribution of experts who come from outside the local community and specific, unusual suppliers, as well as to develop a strong operating cooperation within the destination. An example which can clearly illustrate this is the well-known Alpine Pearls network: a network of Alpine (predominantly small) destinations created almost 10 years ago to offer sustainable holiday experiences and characterized by "soft" mobility. These small destinations have successfully taken on a challenge without imitating nearby, more organized destination, but focussing on their peculiarities. The process has required a cultural change before an organisational one.

Similar remarks apply to the communication of a tourism product, which is essential to spread knowledge on the choices made. Often, initiatives are launched and choices based on quality and value are made, but the

information do not reach potentially interested tourists because of the lack of adequate communication and promotion on the right markets. Detecting and highlighting this problem is not entirely obvious, as it depends on the culture and resources of small mountain destinations which often invest the little resources they have to improve their tourist products, without the certainty that they will be able to promote them.

A second consideration has to do with the ways in which a *destination is managed* and stems from a clear observation: choosing to focus on one peculiar characteristic does not mean that the other many expectations that tourists have when they go on holiday disappear. Those who choose a destination for its cross-country skiing opportunities are not going to give up good food, shopping, a slope of downhill skiing, a day at the spa, etc. This is why the management of a destination must go beyond the limited local dimension of a small resort, and be designed and organized on a larger territorial scale. This already happens in many Italian resorts, where it is easier to find individual smaller resort (such as the South Tyrolean valleys, where even in international rankings the destination is the valley, and nota n individual resort). However, this approach requires to overcome competition between neighbouring resort, which is often hard to die. From this perspective, the destination is the valley (or another territorial unit) and the peculiarities of each single resort are their unique and excellent products. These can be combined in a sufficiently wide mix of products and services which can meet the many and varied demands of tourists who come to the area. A clear consequence of this approach is the need for a wider concept of Destination Management, but it is equally clear that it offers new resources and opportunities to an area, which benefit and create value for everyone.

Destination Management: governance of destinations and definition of the offer

Studying mountain destinations becomes innovative when it combines the usual areas of research – which focus on demand or on the players which build the offer – with a strategic vision which sees them as a combination of services targeted at specific user segments. In this view, it is not individual factors of attractiveness which count, but rather the way in which tourists combine them depending on their own preferences and tastes.

By adopting this approach, a destination becomes a single product through the experience of the tourist. In operational, organisational and management terms, this means adopting a *Destination Management* (DM) approach, which integrates – within a shared strategy – the necessary actions to:

- ✓ Manage the factors of attractiveness and tourist services;
- ✓ Raise interest from the market demand;
- ✓ Positioning the destination in competitive contexts which are suited to the characteristics of the territory.

An effective *DM* process must be able, on the one hand, to analyse, define and manage the factors of attractiveness and various local business components; on the other, it shall translate all these elements into offers which meet market demands in a competitive way (as well as adequate lo local capacities).

On this basis, *DM* turns into a process for the strategic management of the territory. In other words, it becomes the combination of all the activities needed to create a shared vision, which goes beyond internal competition and promotes, starting from the available resources and skills, agreement among different public and private players. This is achieved, among other things, by stimulating their participation in the general plan for the territory and establishing medium-long term cooperation behaviours among local players. *The ability of a destination to attract tourists and compete grows with the integration and inter-organizational coordination* among the various players which are somehow involved in the definition of the tourism offering.

This consideration strengthens the idea that the optimal situation is found where a tourist destination is expressly conceived and managed as a governed inter-organizational network: a network where there is a

leading organization with the specific task of strategically coordinating the various local resources and players.

When it comes to mountain destinations, the implementation of systemic and integrated management methods is based on the idea of an "area-product", the result of an effective and lasting network. Recent and current policies for the development of tourism in the mountains aim at creating forms of cooperation within the destination to promote an area-product, to the following purposes:

- ✓ Ensuring exchanges and shared growth opportunities to generate knowledge;
- ✓ Defining an integrated and sustainable strategic management of destinations, paying particular attention to quality (i.e. the quality of offered products and resources, combined with the quality of relationships among parties);
- ✓ Promoting the continuous training of human resources;
- ✓ Targeting the same markets with differentiated products, with a proactive approach in the interaction between supply and demand;
- ✓ Targeting new markets and specific niches with offers which strongly focus on the peculiarities of local contexts and their emotional and experiential values.

When talking about "smaller" destinations in terms of size and tourist flows, the implementation of the DM approach changes depending on whether they have few or many of the requirements which enable an effective local DM organization. These include: a tourism offering based on an integrated system of services, willingness to cooperate by local business (SMEs and craftsmen); local organization of tourism with central interface functions. When small mountain destinations are not very developed, the main operational goal is the creation of the basic conditions for an effective DM. When they are developed and well known, they can act as benchmark for other destinations.

Destination Governance: an operating platform for the management of Alpine destinations

The concept at the basis of a *Destination Governance* (DG) platform emerges from an analysis which implies cooperation between the structure and the partners of the destination, within an innovative and integrative management of tourism. New forms of integrated management challenge traditional management models which - in a complex and continuously evolving tourism industry – can no longer meet the needs of the various players in the *tourism production* chain.

The theory of "governance" defines the concept as an inter-relation between elements of control and forms of control. In tourism, the concept of *DG* describes a form of self-organisation of tourist destinations. It essentially relies on the cooperation among the people and companies involved in the process of tourism production, under the umbrella of an institutional framework**.** The concept of *DG* stems from the idea that public-private cooperation in the tourism sector – within defined guidelines – can lead to the success and growth of a destination.

In this new approach, roles change significantly from the traditional vision. The pyramid structure where decision are forced from the top down changes into a partnership which is created, grows and develops as a body which can grow and accept new members who are involved in the development of the destination activities.

In practical terms, the implementation of the *DG* means creating a public-private cooperation structure, able to involve all players of the destination who are willing to participate, thus creating a good balance between the interests of residents, private business and public institutions. The *Governance* (a sort of strategic

Governing Board) defines the positioning goals of the destination on the market of tourism and the strategy to achieve them. A *Resort Manager* (a destination coordinator, who works as an operating officer) is responsible for the implementation of such strategy.

The goal of *Destination Governance* is not making profits, but creating added value for the destinations and, indirectly, for all its members. It is a structure that is able to share decisions, creating a peaceful atmosphere and unity of purpose, with the goal of developing a mountain tourist destination which offers an unforgettable holiday, in close contact with nature and local traditions. Starting from individual or "limited" experiences (i.e. related to small contexts or resorts) it may be possible to implement pilot actions to be monitored and validated as projects that can be replicated throughout the Alpine region.

Differentiating offering to mitigate impacts

In general, mountain tourism is still linked to mature traditional products –both in summer and in winter – and suffers from the impact of climate change, both in terms of snowfall and weather in summer and in the intermediate seasons. The key elements for the success of Alpine tourism can be found in the ability to preserve the "atmosphere" of a place, care for the environment, promote typical products, combined with the attention for wellbeing and culture.

A new challenge for summer tourism in the Alps lies in compensating for the problems of winter tourism. Ski tourism, which has driven the local economies of many Alpine resorts for years, has now reached a level of maturity. This is due to the inadequate generational change of users, its high costs and changes in tourists' needs. In recent years, great efforts have been made to identify and offer alternative or complementary winter activities in addition to downhill skiing, as well as summer activities to attract new target users and extend the tourist season. Many tourism operators – encouraged by demands from the market - have therefore invested on an apparently lower-impact use of the mountain, promoting activities that bring into close contact with nature and local communities, in different spaces and at different times than classic tourism.

Future socioeconomic scenarios as crucial as climate conditions

In recent decades, the positive trend of demand for Alpine destinations has dropped and the average length of stay has also drastically decreased. Many destinations have reached their maturity and the market is now saturated. Globalization has exponentially increased the number of competitors and changed tourists' behaviours. The cost of energy is gradually eroding return margins on accommodation and transport. The availability and cost of water are becoming more and more relevant in the production of artificial snow. These elements alone justify the need to question/resize (which does not necessarily mean eliminate) the traditional development model built around the "white dream" of skiing, which has prevailed since the Seventies. What is needed is a strategy based on innovation and flexibility.

Adaptation shall be channelled into long-term tourism planning

Although tourism demand is very adaptable and the behaviour of tourists is constantly and quickly evolving, the tourism offering (of all Alpine destinations) needs more time to plan activities, and make sure that all social, economic and environmental constraints are respected. Some activities can certainly be implemented autonomously by tourism operators, but the essential effort of adaptation shall be centred on a shared strategic approach. The criticalities and threats which currently characterise tourism in the Alps should also be seen as

an opportunity to involve residents in the process of redefining activities, so as to improve the "competitive sustainability" of tourism for each Alpine destination.
Increasing the participation and awareness of all stakeholders – including tourists, local communities and businesses – on the importance to govern changes and, at the same time, define the model to promote their tourism resources and factors of identity is the necessary condition to avoid (or at least reduce) internal conflicts and, on the other hand, share the same intent.

In this view, the adoption of tourism strategies and models with the following objectives is a priority.
First of all, an Alpine tourist destination must be identifiable.
Without its own shared "identity" that is easily identifiable from the outside, the possibility to be chosen by tourists drastically decreases. Local culture, handicrafts, gastronomy, agriculture and the natural environment are strengths among the peculiar characteristics of a destination, and their exploitation for tourism purposes should be promoted.

Secondly, a *gradual, even if partial, de-seasonalization* of the offering should be promoted. The absolutely necessary condition for a tourist to decide to go on holiday out of high season is that the destination is equally enjoyable. De-seasonalizing means reducing the operating costs of infrastructures, reducing the seasonality of jobs, diluting the impacts of peak tourism on the resort. Without abandoning the offer of traditional winter and summer experiences (skiing and trekking), it is now clear and understood that it is important to: invest in gastronomic tourism, creating a brand for local products and developing tasting itineraries; increase wellbeing activities; host interesting sports or cultural events, just to mention a few examples. Nature-based tourism , linked to the direct observation of seasonal phenomena, such as autumn *foliage* with its beautiful colours, the amazing mating rituals of some animals (such as the deer mating season) or the wonderful spring blossoming, can significantly contribute to de-seasonalization.

Also, it is important to *coordinate locally defined development strategies, in line with the goals of the Alpine Convention.* Not all Alpine destinations can offer the whole range of possible activities, so it is strongly advisable to *develop specific brands* which make a destination unique, exploiting its own potentials. This will also reduce the risks deriving from the aggressive global competition in the tourism industry.

Finally, priority should be given to actions aimed at defining and implementing *long-term adaptation programmes and plans, both at regional and local level,* which last more than a single political administration. Public investments should be used for long term planning. They should pay particular attention to initiatives and projects which promote all resources, or at least those factors with the most positive repercussions for the whole local community, rather than be targeted at strongly sectorial initiatives.

Destination Management: the importance of monitoring

Any action on a destination, not just in tourism, always and inevitably causes certain impacts, both positive and critical. A DM system is able to constantly monitor the factors which may, in a specific situation, be considered as particular relevant, either because they are strictly and directly connected to the goals of the implemented strategy, or because they are related to aspects with a very sensitive balance.

As often stated in this document, the competitiveness of tourism is tightly linked to its sustainability, as the quality of tourist destinations largely depends on their environmental and cultural contexts, and by their integration in a local community. In order to face these challenges, it is necessary to take smart decisions on the basis of useful information. Tourism has a great history to tell, and the development of indicators can help tourist destination tell their story in an even more convincing way.

What cannot be measured cannot be improved.

The European Commission has developed a "European Tourism Indicators System for Sustainable Management at Destination Level – Toolkit", promoted by DG Enterprise and Industry (February 2013). It clearly covers all tourist destinations in the EU and not Alpine destinations as such, but it can be perfectly used in their context too. Its use is highly recommended, not only to improve tourism performance, but also for benchmarking purposes. The European system of indicators aims at improving the sustainable management of tourist destinations, and offers all interested parties in the field a useful set of easy-to-use tools to measure and monitor sustainability management processes, and to share and compare progress and results.
By monitoring tourist destinations, it is possible to achieve the following goals**:**

- ✓ Better information for decision-making;
- ✓ Effective risk management;
- ✓ Definition of priorities for action plans;
- ✓ Comparative analysis of performance

Striking the right balance between the needs of tourists, hosting communities and the environment, reducing conflicts and acknowledging mutual dependence requires a special approach to the management of tourist destinations. The European System of Indicators for Sustainable Tourism includes 27 main indicators and 40 optional indicators related to 4 factors:

- ✓ Management of a destination;
- ✓ Economic value;
- ✓ Social and cultural impact;
- ✓ Environmental impact.

In this context, the following contribution by ISTAT takes on particular relevance.

TOURISM IN THE ITALIAN ALPS: SUPPLY AND DEMAND INDICATORS[1].

Foreword

The Alps are a natural region with almost 14 million inhabitants (more than 4 million in Italy alone, equal to approx. 30% of the Alpine population), on an area of 190,959 square km, 27.2% of which belongs to Italy (second after Austria). It is therefore a huge natural area that strongly fosters mountain tourism in all its facets.

The objective of this analysis, which is still under way, is to provide some reference on the use of a few sustainability indicators, selected among those provided by the European Union. A few indicators of tourism supply and demand are described below with respect to Italian Alpine cities, for 2007-2012, from an analytical viewpoint that includes the issue of tourism sustainability, which is increasingly central in the political, institutional and scientific debate. The need to use, as is the case for all the studies carried out within the framework of the Alpine Convention, municipal data and data regarding the whole Alpine region, strongly reduces the amount of available information, and therefore the room for analysis, unlike what happens when a single destination is analysed. Data taken into account for this exercise come from ISTAT measurements on the "Capacity in hotels and other types of collective accommodation"[2] and on "Customer movements in hotels and other types of collective accommodation"[3]. Regarding our analysis, the municipalities of the Alpine area were broken down into two main groups: the Western Alpine region (Piedmont, Valle d'Aosta, Lombardy) and the Eastern Alpine region (Trentino Alto Adige, Veneto, Friuli Venezia Giulia). In some cases the situation of these two main groups was compared with the same situation of individual Italian regions.

Tourism supply: capacity in hotels and other types of accommodation and protected areas

In Italy, in 2012, there were 157,000 types of accommodation facilities (increasing 2.3% versus 2011), that offered more than 4.7 million beds (+0.4% versus 2011). The number of beds in hotels was 2.2 million (equal to 47% of total beds), a figure which is slightly lower than in 2011. Beds offered by other types of accommodation amounted to 2.5 million (53% of total beds), increasing 0.9% versus 2011.

The alpine region contributes to a great extent to the supply of beds in accommodation facilities: 879,000 beds, equal to 18.5% of Italian accommodations, are located in Alpine cities (11.9% in the Eastern Alpine region and 6.6% in the Western Alpine region; *Table 1*). Over the six years of the 2007 - 2012 period, beds available in the Alpine region increased by 6.8% (for a total of 56,000 new beds), especially thanks to the contribution

[1] Care of Istat - Istituto Nazionale di Statistica, Dipartimento per le statistiche sociali ed ambientali (Italian National Institute of Statistics, Social and Environmental Statistics Department).

[2] The report on the "Capacity in hotels and other types of collective accommodation" is an exhaustive survey carried out on a yearly basis. Accommodation present in Italy is analyzed, broken down into hotels, other types of collective accommodation and rental homes. The report quantifies, by individual municipality, the number of establishments, beds, rooms and bathrooms for hotels; of establishments and beds for the other facilities.

[3] The report on the "Movement of customers in hotels and other types of collective accommodation" is an exhaustive survey carried out on a monthly basis. The report quantifies, per month and by municipality, arrivals and overnight stays of (resident and non resident) customers according to the category of establishment and the type of accommodation and according to the foreign country or the Italian region of residence.

of the Eastern Alpine region which, though already well positioned, increased its figure by 9.2% to 566,000 beds in 2012, while the Western Alpine region recorded a 2.7% increase, with a stock of 313,000 units.

Table 1 – Number of beds and accommodation index (number of beds per 1000 inhabitants) per type of establishment and geographical location - Years 2007, 2012

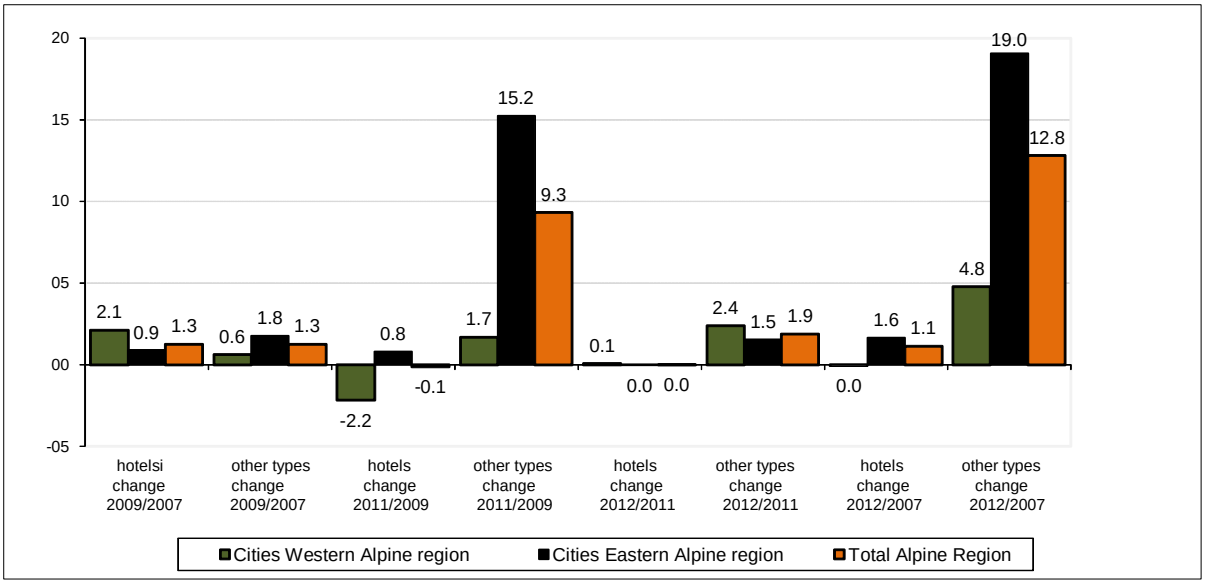
	Number of beds			Accommodation index		
	2007					
	Hotels	Other types	*Total*	Hotels	Other types	*Total*
Western Alpine region	130,166	174,759	*304,925*	55.8	74.9	*130.7*
Eastern Alpine region	293,568	224,858	*518,426*	151.8	116.2	*268.0*
Total Alpine region	*423,734*	*399,617*	*823,351*	*99.3*	*93.6*	*192.9*
ITALY	***2,142,786***	***2,342,795***	***4,485,581***	**37.7**	**41.2**	**78.9**
	2012					
	Hotels	Other types	*Total*	Hotels	Other types	*Total*
Western Alpine region	130,113	183,088	*313,201*	55.0	77.5	*132.5*
Eastern Alpine region	298,399	267,685	*566,084*	150.8	135.3	*286.1*
Total Alpine region	*428,512*	*450,773*	*879,285*	*98.7*	*103.8*	*202.5*
ITALY	**2,250,704**	**2,511,897**	***4,762,601***	**37.9**	**42.3**	***80.2***

Supply trends differ according to the type of establishment analysed. Between 2007 and 2012, the supply of beds in other types of collective accommodation – which increased also in the whole of Italy (+7.2% beds) – increased considerably in the Alpine region (+12.8%; *Chart 1*), the increase was stronger in Eastern (+19.0%) than in Western municipalities (4.8%); the increase in the hotel sector was more modest in all Alpine municipalities and in the Eastern region (+1.1% and +1.6%, respectively) while it was equal to zero in the Western region.

Hotels, after a slight increase in beds between 2007 and 2009, tended to stability or to a decrease (which was recorded, in particular, in 2011 for the Western Alpine region). Other types of collective accommodation recorded an increase in beds for each of the time intervals analysed, which was particularly strong in 2011 when, simultaneously with the Mountain Festival, beds increased by 9.3% in the Alpine region as a whole (15.2% for the Eastern Alpine region).

Because of these developments, the percentage breakdown of the number of beds by type of establishment changed to the benefit of other types of collective accommodation: while in 2007 other types of collective accommodation recorded a number of beds equal to 48.5% in the whole Alpine region, in 2012 they accounted for 51.3% (58.5% in the Western municipalities and 47.3% in the Eastern municipalities).

Chart 1 – Percentage changes in the breakdown of beds by type of establishment and geographical location – Years 2007-2012



Bed & breakfasts, youth hostels and rental homes, in particular, are the three types of accommodation that mainly increased in terms of facilities and beds (with respect to beds, between 2007 and 2012, +61%, +53% respectively and +30% for the whole Alpine region). The Western and the Eastern Alpine region are characterized by quite diverse types of accommodation, with more beds in camping sites and resorts in the Western region (61% versus 29%), while the supply of rental homes is greater in the Eastern region compared to the Western region (44% vs. 13%).

In 2012, the accommodation index – which expresses the potential capacity to host tourists compared to the number of residents – was far higher in the Alpine region than in the whole of Italy (203 vs. 80 beds per 1000 inhabitants) and was particularly high in the Eastern Alpine region (286), while it was lower in the municipalities of the Western Alpine region (132). While figures are growing in both destinations, much can still be done to promote supply in terms of accommodation in the whole Alpine region: figures regarding the provinces of Trento and Bolzano and the Valle d'Aosta region, geographical districts that have selected tourism as a source of income and jobs for the resident population, reached in 2012 320, 437 and 417 beds per 1000 inhabitants, respectively.

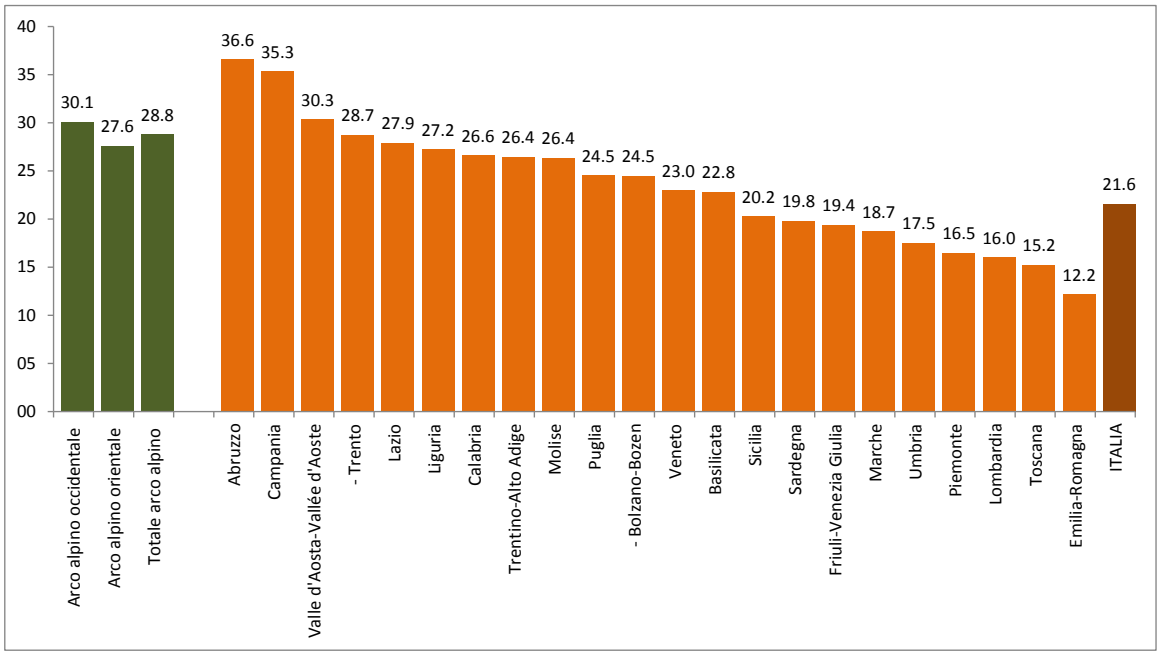
However, supply cannot be sized without taking into account the seasonal spread of tourism demand, still concentrated in peak seasons (summer and winter, for mountain tourism). Tourism could be enhanced by means of a diversification of supply and through the reduction of seasonal variation, promoting tourism in the Alpine region also in those months when accommodation is poorly used, by training tourism industry professionals, by further developing alternative offers to conventional ones and by encouraging tourism based on the promotion of nature.

Establishing and preserving protected natural areas is a major tool to organize environment and landscape protection and, more specifically, to protect local plants and wildlife and, therefore, biodiversity. Besides, the enhancement of our natural heritage is attractive from a strictly tourist viewpoint: "Protected areas are a key

asset of a destination's tourism product. High biodiversity helps ensure the sustainability of natural areas, benefits the destination's image and is attractive to tourists" (European Union, 2013, *The European Tourism Indicator System for Sustainable Destinations – TOOLKIT*, http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents_indicators/eu_toolkit_indicators_en.pdf).

The amount of land covered by protected areas (Euap Rete e Natura 2000) – which amounted to 21.6% in Italy as a whole in 2012 - is variable from a geographical viewpoint and goes from more than 30% in regions such as Abruzzo, the richest region in protected areas (37%), Campania (35%) and Valle d'Aosta (30%), to lower values for regions such as Emilia Romagna (12%), Tuscany (15%) and Lombardy (16%).

Chart 2 – Protected areas (as a percentage of the whole area) by geographical location – Year 2012



The Alpine region, with more than 52,000 square km of protected areas, shows a ratio between protected and total area which is clearly higher than the Italian average (29%). More specifically, the Western Alpine region, with an amount of protected areas equal to 30%, is at the top of the Italian ranking, immediately followed by the Eastern Alpine region (28%), which proves that the preservation of the natural variety that characterizes these areas is a significant objective not just in terms of ecosystem protection and therefore of environmental sustainability, but also with a view to tourism sustainability.

Demand: arrivals, overnight stays, stays and sustainability

In 2012, overnight stays of customers in all accommodation establishments of the Alpine region (*Chart 2*) amounted to approx. 97.7 million (85.5 million in 2007): 68.2% in the Eastern Alps and 31.8 in the Western Alps. Arrivals amounted to 24.3 million (18.6 million in 2007).

Approx. 65.6 million overnight stays and 18.5 million arrivals were recorded in hotels, increasing by 27% and 10% over 2007, respectively. In other types of collective accommodation arrivals amounted to 5.8 million, with 32.2 million overnight stays (+15.4% and +29.6% versus 2007). If we compare 2012 with the previous year, while overnight stays were substantially stable (-1.5% for the Western Alpine region and +1.2% for the Eastern Alpine region), arrivals slightly increased (+1.8 in the west and +2.5 in the east). Between 2007 and

2012 the average length of stay decreased in hotels (from 3.8 to 3.5 days), and in other types of collective accommodation, from 5.9 to 5.6 days (*Table 3*). The gap in the average stay between the two Alpine sides increased to the benefit of the Eastern Alpine region: in 2012 tourists spent on average 3.3 days in the cities of the Western Alpine region and 4.5 in those of the Eastern Alpine region (2.8 days in hotels and 4 in other types of accommodation in the West and 4.9 days and 6 days in the East, respectively).

Table 2 – Number of arrivals and overnight stays by type of establishment and geographical location - Years 2007, 2012

	Arrivals			Overnight Stays		
	2007					
	Hotels	Other types	*Total*	Hotels	Other types	*Total*
Western Alpine region	5,209,716	1,493,321	*6,309,382*	17,316,484	8,453,143	*24,357,973*
Eastern Alpine region	9,366,344	2,952,463	*12,300,873*	41,807,815	19,408,510	*61,152,022*
Total Alpine region	14,576,060	4,445,784	*18,610,255*	59,124,299	27,861,653	*85,509,995*
ITALY	**78,051,422**	**18,098,661**	***91,780,827***	**254,328,742**	**122,313,009**	***354,138,210***
	2012					
	Hotels	Other types	*Total*	Hotels	Other types	*Total*
Western Alpine region	7,226,485	2,122,414	*9,348,899*	20,592,426	10,496,600	*31,089,026*
Eastern Alpine region	11,281,622	3,638,648	*14,920,270*	44,993,535	21,657,892	*66,651,427*
Total Alpine region	*18,508,107*	*5,761,062*	*24,269,169*	*65,585,961*	*32,154,492*	*97,740,453*
ITALY	**81,452,772**	**20,534,424**	***101,987,196***	**253,154,682**	**122,766,587**	***375,921,269***

The gross utilisation index of commercial accommodation can be calculated by connecting data regarding overnight stays with data on the availability of beds, which provides information on the likelihood that a bed is occupied by a tourist in a specific period of reference, thus monitoring the relationship between tourism demand and supply.

The gross utilisation index of beds in 2012 amounted to 27.2 beds used out of 1000 in the Western Alpine region and 32.3 in the Eastern Alpine region, with a 30.5 average for the Alps. Higher utilisation rates in the Eastern Alpine region can be related to the existence of more diversified policies for the consumption of tourism products, which succeed in meeting tourism demand also out of season (spa packages, last minute travels, early snow, Easter holidays, etc.).

Patterns of use vary between hotels and other types of accommodation: in hotels and similar types of accommodation, the index amounted to 41.0 occupied beds in 2012, with little differences between Western and Eastern Alps. With respect to other types of accommodation, the utilisation index recorded much lower values (19.5 beds), with a greater use in the Eastern Alpine region (22.5) than in the Western Alpine region (15.7).

Values are substantially higher than the Italian average for every type of accommodation and for both Alpine districts, and indicator trends over time show substantial stability in the Alpine regions, with the exception of an increase in utilisation recorded by hotels in the Western Alpine region.

Table 3 – Average stay index (average number of overnight stays per arrival) and gross utilisation index (overnight stays per 1000 available beds/year) by type of establishment and geographical location - Years 2007, 2012

	Average stay index			Gross utilisation index		
	2007					
	Hotels	Other types	*Total*	Hotels	Other types	*Total*
Western Alpine region	3.0	5.3	3.6	36.4	13.3	21.9
Eastern Alpine region	4.2	6.2	4.7	39.0	23.6	32.3
Total Alpine region	3.8	5.9	4.3	38.2	19.1	28.5
ITALY	**3.2**	**6.5**	**3.9**	**32.5**	**14.3**	**21.6**
	2012					
	Hotels	Other types	*Total*	Hotels	Other types	*Total*
Western Alpine region	2.8	4.9	*3.3*	43.4	15.7	*27.2*
Eastern Alpine region	4.0	6.0	*4.5*	41.3	22.2	*32.3*
Total Alpine region	*3.5*	*5.6*	*4.0*	*41.9*	*19.5*	*30.5*
ITALY	**3.1**	**6.0**	***3.7***	**30.8**	**13.4**	***21.6***

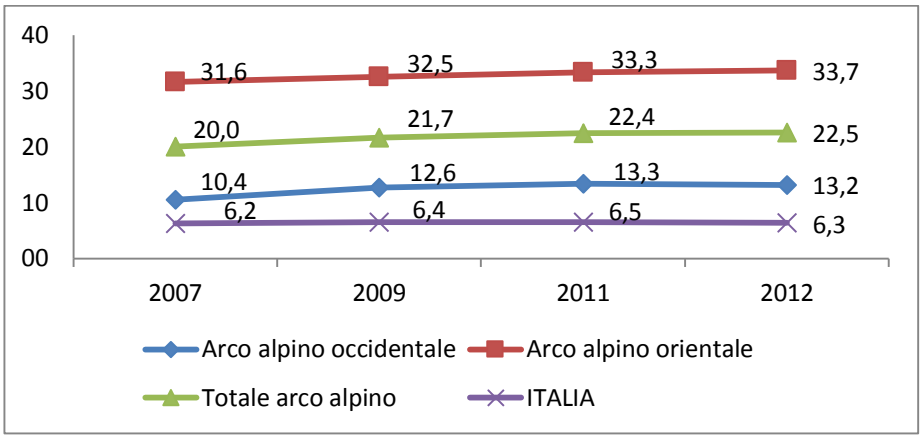
The tourism intensity index (number of overnight stays per 1,000 inhabitants) is a measure of the social and cultural impact of tourism, and focuses on the effects of tourism on residents and on the cultural heritage of a destination.
The number of overnight stays compared to inhabitants is a measure of the actual pressures caused by tourism in the community, in terms of the surplus of services and infrastructures (transport, water and food supply, wastewater discharge and waste disposal, leisure facilities) that would be needed to meet the increasing demand caused by a fluctuation in overnight stays.

Other types of collective accommodation generate a more sustainable form of tourism than hotels. In camping sites, for example, soil occupancy is not irreversible, while rooms in farms or private homes generally belong to multifunctional facilities, whose infrastructures and services are not exclusively used by tourists. In both cases, per capita water and electricity consumption is clearly lower than in hotels.

The tourism intensity index remained stable in the Italian average profile while it grew in Alpine municipalities (*Chart 3*). Tourism intensity of the Alpine region was higher also in all the years analysed, not only than Italian average but also with respect to all the regions, with the exception of Valle d'Aosta and Trentino Alto-Adige,

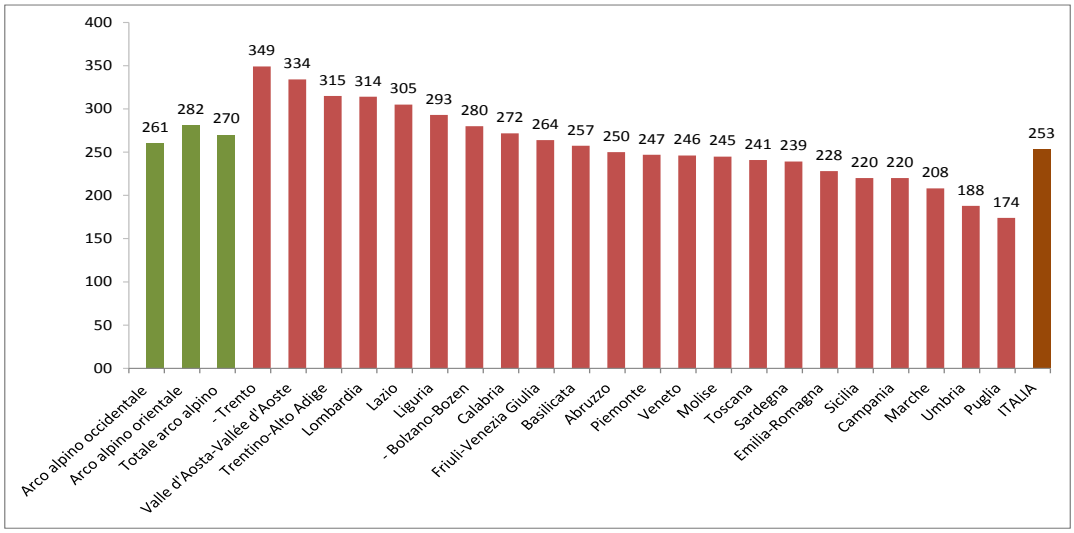
that fully belong to this territory. The relevant contribution of Alpine municipalities is associated with the specific presence, in these areas, of good practices of sustainable tourism (among which, Parking places and shuttle buses in the Parco Naturale di Paneveggio-Pale di San Martino, Val Genova and Alpe di Siusi, Albergo diffuso, Adamello Brenta Park, Club Qualità Parco, Consorzio Gallo Rosso tourism and agriculture mix, climate saving menus, etc.), in line with European indications.

Chart 3 – Tourism intensity index (overnight stays per 1,000 inhabitants) by geographical location - Years 2007-2012



Water is a vital resource for tourism. Tourism is a great water consumer: where water supply is poor, higher water use can cause serious problems to the local population. The suggested indicator, while not being a direct measure of drinking water consumption per tourist overnight stays, represents an indicator of water consumption, and expresses the average number of litres of water consumed per inhabitant. As can be appreciated in the following chart, water consumption per inhabitant in the Alpine area is higher than Italian average (*Chart 4*), which shows the higher pressure exercised by tourism on water resources.

Chart 4 – Average number of litres of water per inhabitant – Year 2008



Food for Thought

While in presence of the limitations mentioned at the beginning of this section, the correct use of indicators in the analysis of the current situation of a tourist destination is clearly useful, especially from the strategic viewpoint of sustainable competitiveness. At a higher territorial level, like the one adopted here which refers to two macroareas in the Italian Alpine region, the factors that differentiate the relevant tourism development and the specific features of their presence in the marketplace appear rather clear.

In this work in progress, some basic indicators were mentioned, that can be used for any analytical framework, which are not sufficient but can be used as reference when a more profound analysis is started around them. In a nutshell, the following 8 indicators were mentioned:

a) supply indicators
   - ✓ accommodation index (number of beds per 1000 inhabitants) that can be considered as a proxy for the significance of tourism in local economy;
   - ✓ structure (in terms of percentage breakdown) of accommodation in the area;
   - ✓ existence and amount of protected natural areas, as a relevant factor for the destination's image

b) demand indicators
   - ✓ average stay;
   - ✓ trend in the 2007-2012 time period;
   - ✓ index of tourism intensity (overnight stays compared to the number of residents)

c) indicators of the relationship between supply and demand
   - ✓ index of gross utilization of commercial accommodation

d) indicators of sustainability of natural resources
   - ✓ drinking water per capita consumption (with reference to the number of residents).

In our opinion, specific focus should be devoted to the analysis of the structure of the accommodation supply, even simply from the viewpoint of the percentage of beds in hotels and in other types of accommodation, for a series of reasons: the coverage of a wider demand and market target; a more widespread presence of tourism micro-businesses at the destination; a different impact in the use of the land; a different level of consumption of resources (water and electricity, for example).

ENVIRONMENT AND LANDSCAPE

Environment and Landscape

In recent years, especially following the European Convention (ELC, CoE, 2000), *landscape* has taken on a strategic role for the quality of life and of the territory. This new vision goes far beyond the simple aesthetic and ecological aspects, and integrates also cultural, economic and identity elements.

According to the most established and widely shared definition, indicated by the ELC, with respect to landscape studies and actions on the landscape, "*Landscape means an area, as perceived by people, whose character is the result of the action and interaction of natural and/or human factors*"(Art. 1, a).

According to this definition, landscape includes several aspects: nature, culture, identity and economy, an important and innovative element.

The concept of landscape applies to the entire territory (this is another innovation introduced by the Convention according to which landscape covers outstanding, ordinary and everyday, degraded, natural, rural, urban, and peri-urban forms of the territory), consequently, the Convention associates landscape with the concept of *complexity*. In this respect, *articulated actions* are identified for landscape, *in terms of protection to conserve and maintain, planning to enhance, restore, create landscapes, and management to guide changes, therefore actions are not only connected with limitations and plans, but are aimed at a project and its implementation*.

Sustainable Tourism/Responsible Tourism

Keeping in mind that:

i) tourism is one of the fastest growing economic industries in the world;
ii) within the framework of international tourism, broken down into macroareas, Europe is the most visited destination;
iii) activities linked to an efficient organization of natural and cultural heritage, including tourism, play a significant and fundamental role for the economic development of sites, regions and nations, particularly those (such as Italy and Europe more in general) with a rich environmental, cultural, landscape, historic and art heritage;

the elements and features of nature tourism and of the heritage that shape local identity play a central role, as well as their relationships with the environment and the landscape, which express the more general concept of *sustainable tourism* (a concept that is directly derived from the more general concept of "sustainable development") which represent significant elements and are a solid backbone for the social and economic dynamics in the Alpine region in particular.

According to the UNWTO (United Nations World Tourism Organization) tourism can be defined as sustainable "*when it meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources 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*".

The concept of sustainable tourism expressed by the EU is even more explicit: "*Sustainable tourism is tourism that is economically and socially viable without detracting from the environment and local culture. It means business and economic success, environmental containment, preservation and development, and responsibility towards society. These three facets are interdependent. The limits of the natural, economic, and social resource base and their capacity to regenerate define the economic sustainability of tourism. The economic success of tourist businesses determines the environmental and social benefits that tourism can generate. Sustainable tourism development is linked to a growth in quality rather than in quantity. Quality consciousness of tourists is also a prerequisite for sustainable development, and both sustainability and quality need to be integrated. They are indispensable for the competitiveness of the tourism sector. The competitiveness of tourism enterprises and tourist destinations requires efficiency that can pay for sustainability and an optimal sustainable yield. In turn, quality of the workforce, regard for the local society, and a lower impact on the environment set free money for resource efficiency".*

As is well known, tourism models, which are sensitive to environmental and ecological issues, are surprisingly growing in the world. They experiment new types of accommodation that enhance heritage and resources for the development of local economy.

In order to be sustainable, that is, to meet the need to maintain the same recreational opportunities for future generations while simultaneously improving the social, cultural and ecological situation of host regions, tourism must necessarily have *heterogeneous strategic objectives*: in addition to achieving good quality standards in the services it offers, it must also protect or improve local natural heritage, respect local traditions, customs and lifestyles, produce positive effects on the main social and economic indicators, such as education, employment and the number of young entrepreneurs.

A sustainable tourist system must therefore manage resources in order to fulfil economic and social requirements and help create social and cultural wellbeing, maintain cultural integrity, strengthen local cultures, feature a limited number of dwelling facilities and infrastructures which are harmonically included in the local landscape; it must finally be able to make those changes reversible which inevitably tourist activities cause to the environment and the landscape.
It must also have a feature which is represented by the necessary length of time – often significant, years or decades -, to which tourist systems must be subject before tangible results can be observed regarding their beneficial influence on the ecological balance, local cultures and social structures.
In this respect, sustainable tourism is also *responsible tourism.* While respecting the environment and the landscape, it is not against economic progress, rather it aims at promoting constant and sustainable growth, in order to fairly meet the needs and aspirations of present and future generations by integrating development and the protection of natural and cultural heritage.
As the European Commission points out, *"tourism sector's competitiveness is closely linked to its sustainability, as the quality of tourist destinations is strongly influenced by their natural and cultural environment and their integration into a local community.*
Long-term orientation to sustainability of tourist activities can foster greater competitiveness of European tourist destinations, thanks to the improvement of standards for the preservation of the variety of local landscapes and cultures and the quality of products and services" (COM 621/2007).

The different forms of sustainable tourism (heritage tourism) and their connection with the landscape

The concept of heritage is about something that "moves from the past and looks to the future", it refers to a "heritage" that current generations receive from their ancestors, and that they intend to preserve as a valuable asset for future generations.
This concept highlights the generational link between the characteristics of a territory and those who have lived and still live in it. It is based on relationships, integration of different aspects, resources, valuable elements, including historical, artistic, agricultural, handicraft, natural, environmental and landscape features. The experience of sustainable tourism implies a deep contact with the landscape, and especially the customs, and the culture of a place, as well as the key features of the area. "Heritage tourism", in a broad sense, includes all of its resources - natural, agricultural, historical, cultural - it also includes some forms of sustainable tourism such as nature-based tourism (eco-tourism, wilderness tourism, adventure tourism), on-farm tourism (understood as a way of linking tourism and agriculture), cultural tourism, and other forms of mixed or integrated tourism.

Nature-based tourism

With regard to *nature-based tourism*, including all its specific segments - eco-tourism, wilderness tourism, adventure tourism - thanks to the variety and beauty of its natural sites, Europe offers a wide range of eco-tourism destinations: mountains, hills, rivers, lakes, cliffs, coasts and seas featuring different species, habitats, important specimens of fauna or flora, in some cases unusual or representative of a variety of ecosystems. Among these, the Alps are definitely a unique heritage, an authentic excellence, one of the most important and appreciated natural tourist destinations. This is particularly true in the light of the growing tourist demand for sheltered places of the natural environment, especially by tourists from large European cities and / or heavily industrialized areas.
In this perspective, with regard to nature-based responsible tourism, (specifically ecotourism), the exploration, study, development and, above all, the integration of all the resources into a network are becoming of paramount importance. Indeed natural tourism is aimed, on the one hand, at understanding and promoting the conservation of natural resources and its cultural landscape while ensuring the integrity of the ecosystem and, on the other hand, at the creation of benefits, or the socio-economic development and increased well-being of local communities.

Cultural tourism

The term *cultural tourism* refers to another approach to the enhancement and enjoyment of the Alps and their resources, it is aimed at the discovery and understanding of cultural and local features and it stems from the desire to experience the charm and atmosphere of a city and its artistic beauties, as well as the small villages scattered throughout the surrounding area, including national parks with all their traditions, cuisine, the handicrafts and other socio-cultural elements characterizing an area.
With regard to cultural tourism, following the description given so far and with reference to the Alpine region seen as a dynamic cultural landscape - the result of millennia of human intervention on the natural environment - a very significant role is played by man-made transformations driven by *economic activities such as farming, animal breeding and agriculture as well as the seasonal patterns of pastoral transhumance* to *exploit "useful" highland areas, i.e. productive for the purpose of farming, forestry and sheep-farming*.

In this sense, mountain farming, in its multifunctional aspects (from high quality production drawing on ancient knowledge, the maintenance of the "agrarian cultural landscape", land and environmental monitoring, enhancement of biodiversity, the "socialization" of nature) reaffirms *Alpine cultural tourism* as

originating from the interdependence between ecology and economy.
Farm tourism is thus the expression of a specific segment of nature-based tourism, which, by its very nature, involves agricultural and rural development policies that lead to the preservation of the landscape and environmental balance as well as balanced land management practices, including tourist activities linked to agricultural practices.
In this regard, the various recent policies for rural areas at the regional, national and especially European level, clearly indicate the *strategic links between a model of rural development and the area*. The latter involves the *diversification of agricultural activities and requires innovative ways of managing the land and the landscape,* both in terms of protection and enhancement.
The latter policies at EU level, are therefore seen as opportunities for development related to a broader, more complex, multi-sectorial management of rural areas (e.g. the diversification of economic activities for the creation of new sources of income and / or for dealing with structural weaknesses) as well as multifunctional (e.g. the multi-functional role of agriculture in terms of supply of goods and services located in the area: production, tourism, hospitality, care and maintenance of rural areas, etc..).
This is the appropriate framework to appreciate and promote sustainable tourism in the Alps, taking into account the different dimensions of sustainability (*ecological, environmental, social and economic*) as a driving factor in land development, while enriching and qualifying accommodation facilities based on local cultural heritage and landscape resources.
Small-scale infrastructure such as information centres and tourist signposting or recreational infrastructures offering access to natural areas, with small-capacity accommodation, development and / or marketing of tourism services relating to rural tourism, new forms of tourism based on the enhancement of local heritage to create a network of resources, are just some of the tourist activities related to agriculture promoted and encouraged by European legislation.
Studies have been conducted at an international level to review the most innovative models, both nationally and internationally, aimed at utilizing and integrating the potential of an area to create development tools, while at the same time aiming at the regeneration and monitoring of fragile landscapes, sometimes neglected and therefore possibly a reference for sustainable tourism in the Alps. In addition to *rural and farm tourism* they feature: the *multi-building hotel*, a rural housing model for small towns based on historic buildings and houses in the same village and *hotelpodere*, a tool to promote sustainable tourism starting from the historic countryside to the cities.

In this sense, farm tourism, as well as all the other different forms of sustainable tourism (eco-tourism, wilderness, adventure tourism, cultural tourism, etc.) envisaged in a tourist system based on the combination of nature and culture, will contribute to sustainability, maintenance and / or improvement of the land and, consequently, to quality of life in relation to environmental, economic and socio-cultural aspects.

Sustainable tourism and protected areas[4]

An approach to sustainable tourism in the Alps in relation to the environment and landscape, certainly implies the *protected area* as a key factor, or the *key attraction* (referring to all the different features based on which people choose that destination - cultural, historical, natural, artistic, and rural). Indeed the very concept of sustainable tourism originates from the notion of protected area. In many cases, the applied

[4] For more information related to these topics please refer to the specific TF of the Italian Presidency

models of tourism management and organization have been connected to the very aims of the protected area (the conservation of the natural and cultural environment, environmental education, scientific research, environment-friendly recreation, promoting environment-friendly sustainable socio-economic development). The experiences gathered in protected areas, intended as the original and privileged environment for the design, testing, implementation and dissemination of eco-tourism strategies, should be considered as pioneering also with a view to the identification and development of methodological frameworks useful to evaluate the goodness of ecotourism practices. In protected areas various activities were carried out to evaluate their effectiveness not only in relation to the achievement of their mission of conservation of natural and cultural resources, but also with respect to related strategies of eco-tourism development.
To pursue the development of sustainable tourism, in its relations with the environment and the landscape, it may be useful, even in the Alpine region, to refer to and may be partially reproduce effective experiences or best practices developed in other contexts that have achieved positive results for nature conservation as well as the management of environment-friendly recreational activities.
In particular, following the suggestion of some surveys and a review of best practices, it is essential to analyse the strategies, organization and management tools specifically applied in protected areas.
For example, in the specific case of ecotourism, here are some key tools for the assessment of best practices in ecotourism activities (and other related ones) to be considered as a strategic planning process for sustainable tourism in the Alpine area: the European Charter for Sustainable Tourism, Parks PAN (Protected Area Network), Europe and the initiative "*Europarc Transboundary Park Evaluation*" aimed at identifying principles for the planning and development of cross-border experiences in the field of conservation and ecotourism, as well as the *European Diploma of Protected Areas*.

A SWOT matrix for the landscape

In line with all of the above, the suggestion is made, at the operational level, to formulate strategies and identify possible actions, with the aim of attaining the goals of sustainable tourism in the Alps based on the so-called internal factors and / or approaches, as well as the perception of the mountain landscape and especially of the Alps, and also on the positive external conditions that can effectively contribute to an increasingly synergistic and locally balanced tourism.
In detail, here are some internal factors, priorities, key references or *strengths*, since they express the quality of the landscape, directly related with the area and immediately related to the environmental and, more generally, landscape paradigm:
• the symbolic image of the mountain;
• ecological and environmental biodiversity;
• the differentiation and characterization of the sites;
• the common heritage of less well-known destinations.

And here are also the main *opportunities* considered as particularly relevant external conditions, namely:
• the presence of Alpine protected areas;
• the growing interest for travelling, increasingly felt as a *modus vivendi* that highlights and expresses a deep and inclusive relationship with places;
• an increasing attention for nature and agro-forestry pastoral activities;
• the development of flexible and re-convertible infrastructures and ski facilities, closely related to territorial identities;
• adaptability and flexibility of small urban centres;
• the introduction and increasing use of new forms of light tourism;
• the presence of environmental connection networks, encompassing historical, cultural, and ecological ones.

In terms of weaknesses (*criticalities*), among others, the following factors should be considered:
• the low quality of some urban centres and their furniture (energy-hungry cities, uncontrolled expansion of some ski resorts, the difficult reconversion of some ski resorts, etc.);
• lack of a cultural background, of knowledge and awareness of local resources;
• urban sprawl, traffic congestion and pollution in a number of cities. Even in some urban areas in the Alps, population growth constantly clashes with the malfunctioning of the cities and their metabolism, with urban sprawl, excessive building, resulting in the destruction of the natural and farming land, with traffic congestion, and finally with the effects of climate change. At times, these signs reflect a deterioration of the landscape and of the quality of life of the inhabitants themselves;
• if on the one hand it is hard to share common objectives, on the other hand a unitary effective governance is lacking. The cultural diversity of Alpine local communities dictates complex management systems. Conversely, more often than not, mountain areas organized and managed by many small local authorities, tend to autonomously pursue and implement diverging and partial goals;
• demographic decline and the abandonment suffered by many Alpine areas bring with them the loss of valuable villages, resources, and identity features as well as the loss of local roots. Part of the historical, architectural, natural and landscape heritage of many inland Alpine areas, as well as the Apennines, once political, religious and economic capitals, are waiting to take on new meanings and new roles, in many cases still difficult to imagine, and possibly generated as a result, and in connection with, the abandonment of certain areas;
• accessibility needs and the desire to "quickly" reach even the most remote destinations endanger the identity and landscape heritage in some areas.

And finally, as regards the *threats*, among others, the following factors may be considered:
• climate change, with respect to which the Alpine region is extremely vulnerable, albeit with different situations at the local level;
• the loss of identity and landscape integrity of certain places;
• loss of cultural traditions and the abandonment of traditional local crafts and activities;
• over-exploitation of natural resources.

IN SUMMARY

The sustainability of tourism and in tourism as a balancing factor.

The spread and persistence of tourist activity in Alpine resorts should be very carefully monitored with very clear guidelines so as to translate the best local strategies into actions and balance the various aspects of the local community with the tourist offer. It should not be forgotten that this contributes not only to improve the local economy but also to enhancing the identity of individual destinations, whether historical, cultural, social or environmental.

The involvement of the local community

A *Community Model* is a very strong competitive factor in the Alps compared to other areas. Hence the

crucial role of “networking" between public and private, between the different tour operators and more generally economic actors, between the latter and the residents, and finally between the local community and the tourists. All these networks must be encouraged and supported.

Not only environmental sustainability

The current trend is to demonstrate the environmental sustainability of projects (with a different degree of success), often taking economic sustainability for granted, especially when private actors are not alone in carrying out the project and public grants or intervention are required. If affordability is not verified and reasonably expected, later consequences may turn out to be very serious when the requested environmental sacrifices are not matched by the desirable economic and employment benefits associated to the project. And this happens more often than it may seem. Perhaps the time has come to impose strong constraints on the submission of an economic sustainability project, including specific measures.

A territorial rebalancing of opportunities

The imbalances between different local areas turn out to be a source of potential conflict, and even of abandonment. The role of the so-called "top destinations" which can count on a well-established and positive image in the market and on high tourist demand, is key to attract visitors to the region, since it is impossible to choose something that you do not know. However, they should not work as areas of absorption but rather as “radiating hubs" to promote greater knowledge and appreciation of the surrounding area. Plans for local cooperation in this direction are to be encouraged in every way.

A culture of values rather than just legislative constraints

The goal of sustainable competitiveness of a tourist destination cannot be entrusted primarily, let alone exclusively, to legislative constraints, although they can certainly be effective in certain situations. It is also necessary to put in place a series of parallel initiatives aimed at developing *a culture of value*: the value of each and every element making up the identity of the local community, regardless of whether they constitute a productive resource or not. When the culture of value becomes the common heritage of people, then you will reach the goal of establishing a "hierarchy" of those references (the preference functions) guiding the choices of every individual, in every circumstance.

The aim of the tourist experience

Even when it comes to personalized consumption or to the experience of feeling involved with the place, behaviours implying a far more complex host area-tourist relationship, the Alps offer interesting opportunities. The mountain, in its broadest sense, conveys and brings to life experiences that go well beyond usual ones, it can communicate strong feelings and offer activities that make the guest feel as an "insider" and experience a very close contact with the environment and even of “dialogue” with the resident population, especially in summer tourism.

The "small" tourist destinations

Smaller tourist resorts are encouraged to identify very specific characteristics or express a unique mission (Unique Selling Proposition - USP) that makes them competitive against major destinations. It is certainly nothing new in business management, much less in tourism, but it is certainly a novelty in Alpine tourist destinations that so far have been sticking to substantially the same offer (landscape in summer and skiing in winter). These new motivations pave the way to new activities, practices, and a wide range of fruition modes (think, for example, of the role of Christmas markets for tourists in some Alpine resorts) and will certainly promote a multi-dimensional mountain tourism, where there is space for most of the resorts to find a unique expression and tourist proposal.

Common objectives

The priority actions of the Alpine Convention, to be encouraged with all possible means, include the following objectives: develop innovation and management capability of the tourism actors in the Alps; improve well-being on a regional scale through cooperation between tourism and other sectors; make the benefits inherent to sustainable tourism offerings visible to consumers.

The rationale and tools of Destination Management (DM)

In short, the DM results in the process of strategic management of the territory, i.e. in the set of tasks required to create a shared vision, overcoming internal competition and encouraging, based on the rich resources and skills available, agreements between actors (public and private). It is also designed to stimulate the participation of all the stakeholders to the overall design of the area, fostering long-term collaboration and integration between and among the local actors. *The appeal and competitiveness of a destination grows in parallel with the level of integration and inter-organizational coordination* between the various players who, for various reasons, are more or less directly involved in the development of the tourist offer, including residents.

The importance of regular and on-going monitoring

What is not measured cannot be improved.
It is considered particularly important to use the "European System of indicators for sustainable tourism destinations - Toolkit", sponsored by DG Enterprise and Industry (February 2013) of the European Commission. Although this applies to all tourist destinations in the EU and not the Alpine destinations specifically, however, it is perfectly usable in this context, so it is strongly recommended to use it, not only to improve their tourist performance, but also as a benchmark. The European System of indicators is intended to improve the sustainable management of destinations by providing stakeholders a useful package of user-friendly tools to measure and monitor the processes of sustainability management as well as to share and compare the progress made and future achievements.

Diversification in the accommodation offer

For an Alpine destination, diversification is not only a tool to attract diversified tourist targets, but also to

promote the spreading of micro-entrepreneurship at the local level and therefore a greater involvement of residents in tourism; new hosting solutions to maximise the value of the local heritage, linking the diverse local resources, are just some of the farm-related tourist activities, which are promoted and encouraged by European legislation. They can certainly become tools to regenerate and monitor fragile landscapes that are neglected sometime and that could therefore become the target for sustainable tourism initiatives in the Alps.

Information and Communication Technologies (ICTs)
More and more SMM (Social Media Marketing), Mobile Technology, SEO (Search Engine Optimization), SEM (Search Engine Marketing), GDS (Global Distribution System) and IDS (Internet Distribution System) are featured by Travel 2.0 and certainly work plenty of interest and attention, because of their potential for development.

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The individual contributions in full and expanded form shall be forwarded to the Presidency of the Alpine Convention with the report.