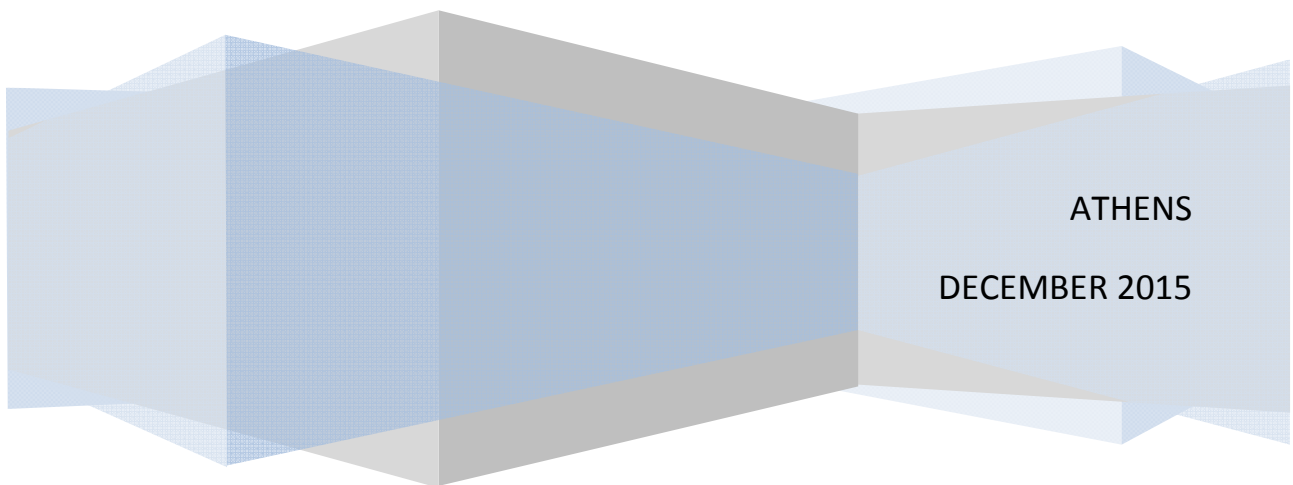


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# *THE ROLE OF DARK TOURISM IN DEVELOPING THE DEMAND FOR THE EGYPTIAN TOURIST PRODUCT*

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## **ABSTRACT**

The tourist activity is characterized by its variable and diverse nature as it is a human activity involving a variety of attributes that need constantly to be satisfied through the different types of tourism. Meanwhile, the global transformations and developments that occurred during the past two decades have led to an increasing demand for more specialized types of tourism, among which, is dark tourism.

The variety and diversity of tourist sites and destinations for this type of tourism all over the world, has encouraged many countries to take advantage of it as a means of developing their tourist demand, in addition to learn from past mistakes and avoid them in the future.

Egypt has an abundance of dark tourism attractions, such as battle grounds, cemeteries of military leaders and international celebrities, memorials, houses of leaders, places of murders or assassinations, cemeteries, shrines, etc. Nevertheless, all these elements are not effectively utilized. Consequently, this study aims at shedding light on dark tourism as a new trend in the tourism industry, as well as, studying and making an inventory of its attractions in Egypt. It also

concludes some results and recommendations that can be helpful in putting dark tourism on the Egyptian tourist map and contributing to the development of tourist demand to Egypt.

**Keywords:** Dark tourism, Dark tourism attractions in Egypt, Dark tourism demand.

## **1 INTRODUCTION**

Tourism is considered a human activity that involves many dimensions that require constant gratification through the various types of tourism. The recent emergence of global developments and transformations led to an increasing demand for more specialized types of tourism, among which is dark tourism. Furthermore, due to the international multiplicity and diversity of tourist destinations for this type of tourism, many countries have tended to achieve the maximum benefit from it in terms of developing a special tourism demand and learning from past mistakes in order to avoid them in the future (Varma, 2010).

Dark tourism, as a modern tourism term, is described as the intentional and unintentional tourists' visits to destinations with a dark history associated with the idea of death, disasters, human tragedies, or atrocities. Such places include battle sites, military leaders' and international celebrities' tombs, soldiers' and war victims' memorials, great characters' monuments, killing and assassination sites, ethnic massacres and cemeteries, as well as, mausoleums and leaders' houses. The term may also include celebrations that venerate the memory of those who died for fighting for and defending their beliefs, or those who were murdered as an objection to their work and their achievements, as well as, the various manifestations such as throwing flowers on the graves of war and battle victims or leaders and celebrities by their relatives, beloved ones and friends, in recognition of their gratitude and sorrow.

Dark tourism aims at healing wounds and entails a collective sense of identity and empathy, reunion with grandparents, revival of events and self-fulfillment, self-discovery, commemoration, education and entertainment (El-Manhaly, 2015).

## **2 RESEARCH PROBLEM**

Despite the availability and diversity of dark tourism attractions in Egypt, such as battles' and wars' sites, soldiers' and celebrities' tombs, memorials, leaders' homes, places of killing and assassinations, cemeteries, mausoleums and others, they are not optimally exploited. Thus, the present research aims to shed light on the attractions of this type in Egypt. It also aims to study the

possibility of setting dark tourism on the Egyptian tourist map to achieve excellence for the Egyptian tourist product and increase its future tourist demand.

### **3 RESEARCH HYPOTHESES**

With reference to the conceptual framework and research problem, the hypothesis of the study turns out to be as follows:

- Dark tourism can contribute to the excellence of Egyptian tourism product and thus develop its tourist demand.

### **4 METHODOLOGY**

The present research aims to study dark tourism and its role in developing the demand for the Egyptian tourism product. The theoretical part reviews previous tourism studies associated with dark tourism, as well as, the important attractions of dark tourism in Egypt and its geographical distribution inside the various Egyptian governorates.

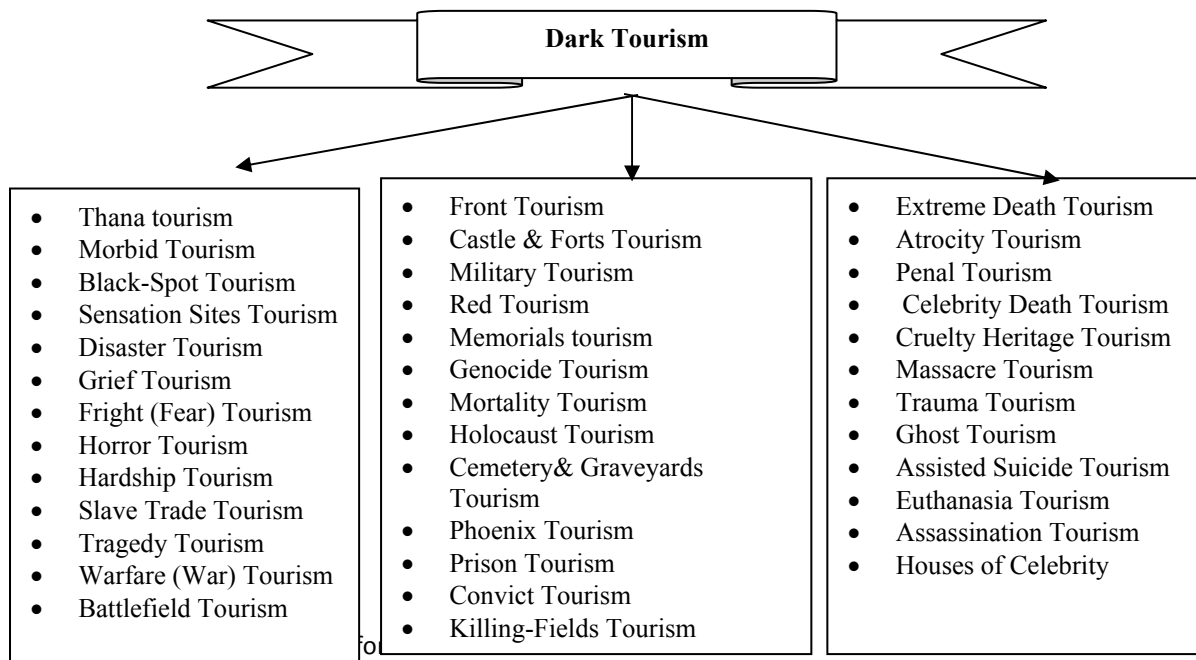
The practical part of the study consists of a questionnaire directed to the managers of the travel agencies category "A". The total population consists of 1915 agencies, according to 2013 statistics. The researchers distributed 400 questionnaires on travel agencies located in Cairo and Alexandria personally or via emails. The agencies have been selected randomly after excluding the agencies specified in organizing Haj and Umrah tours. The questionnaire aimed at determining the extent of awareness and importance of dark tourism to Egypt from the agencies' perspectives and investigating the inclusion of dark tourism within their tour programs, as well as, their future intention to participate in the various marketing activities for this type of tourism. This enable the researchers to reach a set of results on which a number of executable recommendations can be suggested that will definitely serve the subject of the study in terms of placing dark tourism on the Egyptian tourist map and contributing to the excellence and development of the demand for the Egyptian tourism product.

### **5 LITERATURE REVIEW**

#### **5.1 The Emergence and Development of Dark Tourism**

Visiting places associated with death is not a modern phenomenon. People have long been accustomed to visit sites associated, one way or another, with death, suffering, violence or disasters. This could be recognized in the old Roman games for gladiators cycle where suffering

and death were the core of the wrestling games (Stone, 2005a), or during the Middle Ages, as the attendance of public executions has become of the main interests of travelers (Stone and Sharpley, 2008). This trend of visiting places associated with death or violence has continued for centuries as there was an increasing care for sites associated with conflicts and events that affected the human's fate, for example, visiting the anonymous bodies' exhibitions, which has become a regular component in the trips of the 19<sup>th</sup> century in Paris and has appeared in England afterwards (Seaton, 1999).



Source: EL-Manhaly (2015), pp. 11-15.

Over the past decade, this trend has widened to the extent that the war-related sites and destinations started to form the largest category of tourist attractions in the world (Smith, 1998; Stone, 2006). By the beginning of the twenty-first century, dark tourism research has witnessed a deep and accurate boom which attracted a growing academic interest, as well as, media attention at the different levels (Stone, 2005b; Stone and Sharpley, 2008; Stone et al., 2013). Meanwhile, this period has witnessed the emergence of the first book for dark tourism entitled “Dark tourism: The Attraction of Death and Disaster” (Seaton and Lennon, 2004). It also witnessed the creation of the Dark Tourism Research Institute in 2005 at Lancashire University in Central England, which aimed at increasing the knowledge concerning the tourist visits geared to death and disaster sites, and increasing the relative weight of dark tourism by the press and broadcast media (Stupart, 2012).

Consequently, more research attention was given to dark tourism to reveal the complexities of this phenomenon. This was emphasized by Sharpley and Stone (2009) who stated that dark tourism is still very limited within the social, cultural and political contexts.

Recently, several terms have been used alternatively with dark tourism reflecting multiple forms that are linked to the attractions or the experience of death, disaster, or suffering. These are presented by the figure 1.

## **5.2 Classification of Tourists and Dark Tourism Attractions**

Scientists identified two groups of visitors visiting dark tourism sites as follows: Category I: Travelers for the purpose of linking personal thoughts, experiences, grief, sorrow and memories that are emotionally or physically or spiritually connected, one way or another, with the event site; as relatives or friends of the deceased, visits of honor, or commemoration. This category is directly related to the site (Best, 2007) and is referred to as Diaspora Tourists due to their deployment in search of their roots or for reconciliation with a particular event, thus their travel is mainly for learning (Stupart, 2012).

Category II: Travelers to death, disasters' and tragedies' sites for the purpose of entertainment and excitement with no link to the site or event, it only adds to their overall tourist experience value. Travelers in this category are referred to as a normal or public Visitor Viewer (Muzaini et al., 2007).

As regards the classification of dark tourism sites, it is very complex due to the multiplicity and diversity of those sites which range between real sites with original artifacts such as the holocaust sites, and those totally commoditized ones apart from the events that are presented (Stupart, 2012). Therefore, several classification models of dark tourism attractions have appeared that are presented by the following table:



Table 1 Comparison of Dark Tourism Models

Dann Classification	Stone Classification, 2006 "Dark tourism scale"	Stone Classification "Seven categories of darkness suppliers"	Analytical matrix for the demand and supply of Dark Tourism
Identifies areas and their characteristics in a descriptive context to a large extent <u>but it lacks the theoretical bases.</u>	Presents a penetrating insight of dark product features in a theoretical framework, but it lacks a <u>clear determination of the types of these sites.</u>	Achieves access the dark scale, through a developed taxonomy that takes into account the types of dark <u>sites</u> , but <u>does not handle the demand f or these sites.</u>	Determines dark tourism sites in a framework that takes into account the demand for these sites and which differs according to the tourists' motives.

Source: EL-Manhaly (2015), p.41

## 5.2 DARK TOURISM ATTRACTIONS IN EGYPT

The attractions of dark tourism vary among different Egyptian governorates as it is presented by the following table:

Table 2 Dark Tourism Attractions and their Geographical Distribution among Various Egyptian Governorates

N	Governorate	Type / Site
1.	North Sinai	<ul style="list-style-type: none"> <li>- War and Forts Tourism: Military Museum, Horus route "War and Trade Route," El-Arish Castle, Tina Castle, Castle or Moufarrej, Tel Kawthar (a military shelter of Israeli forces in 1967: 1973).</li> <li>- Disasters and Calamities Tourism: Rain Streams' ruins at Ras Sidr (2010).</li> <li>- Massacres and Atrocities Tourism: the massacres of El Arish, Rafah and Sheikh Zuwaid which claimed the lives of the military people in Egypt.</li> </ul>
2.	Southern Sinai	<ul style="list-style-type: none"> <li>- Horror and Ghost Tourism: Mount El Banat at Saint Catherine.</li> <li>- Wars, Castles and Forts Tourism: Soldier Castle at Ras Sidr.</li> </ul>

3.	Suez	<ul style="list-style-type: none"> <li>- Wars and Forts Tourism: Metla Path and 24<sup>th</sup> October Museum in Suez.</li> <li>- Memorials Tourism: October martyrs memorial.</li> <li>- Cemeteries Tourism: The 6<sup>th</sup> of October martyrs' tombs.</li> </ul>
4.	Ismailia	<ul style="list-style-type: none"> <li>- Houses and Palaces of Distinguished Characters and Leaders: de Lesseps Museum.</li> <li>- Wars and Forts Tourism: Police Museum, Abu Atwa Abu Tanks Museum, Tree area, Ferry 6 ( martyrdom area of Abdel Moneim Riad)</li> <li>- Memorials Tourism : 6<sup>th</sup> Ferry Memorial area, the memorial of to the Armed Forces Field.</li> </ul>
5.	Port Said	<ul style="list-style-type: none"> <li>- Wars and Forts Tourism: Port Said Military Museum.</li> </ul>
6.	Damietta	<ul style="list-style-type: none"> <li>- Wars and Forts Tourism: Orabi Fortress.</li> </ul>
7.	Sharqeya	<ul style="list-style-type: none"> <li>- Houses and Palaces of Distinguished Characters and Leaders: Ahmed Orabi Museum.</li> <li>- Massacres and Atrocities Tourism: Bahr El Baqar Massacre Museum.</li> </ul>
8.	Cairo	<ul style="list-style-type: none"> <li>- Horror and Ghost Tourism: Baron Palace, Zuwayla door.</li> <li>- Houses and Palaces of Distinguished Characters and Leaders: Abdeen Palace Museums Group, the house of the President Gamal Abdel Nasser, the house of the President Mohamed Anwar Sadat, the Nation House Museum (Saad Zaghloul house), leader Mustafa Kamel Museum, the Museum of Umm Kulthum at Manesterly Palace, Abdul Halim Hafez Museum at Zamalek, Jeijer Anderson Museum.</li> <li>- Wars and Forts Tourism: October War Panorama, Fortress of Babylon, Military Salah al-Din Castle Museum.</li> <li>- Assassinations and celebrity deaths' Tourism: assassination platform of the President Anwar Sadat in Nasr City.</li> <li>- Memorials Tourism : Anonymous Soldier Memorial in Nasr City.</li> <li>- Tombs / Graves Tourism: the tomb of the President Gamal Abdel Nasser, the tomb of the President Mohamed Anwar Sadat, the tomb of the leader Saad Zaghloul.</li> <li>- Massacres and Atrocities Tourism: the massacre of the Mamluks at the door of the castle and Bab El Azab Route, killing and violence events at El- Tahrir Square during the 25<sup>th</sup> January Revolution.</li> </ul>
9.	Giza	<ul style="list-style-type: none"> <li>- Houses and Palaces of Distinguished Characters and Leaders: Revolution Leaders' Museum, Taha Hussein Museum, Ahmed Shawky Museum, Mahmoud Khalil Museum, El-Gezeera Museum , Gamal Abdel Nasser and Anwar Sadat Museum at the Pharaonic Village.</li> <li>-Cemeteries Tourism: Giza , Saqqara and Dahshur Pharaonic Civilization Pyramids</li> </ul>

10.	Menoufia	<ul style="list-style-type: none"> <li>- Wars and Forts Tourism: Denshway Museum.</li> <li>- Assassinations and celebrity deaths' Tourism: El-Sadat Museum of Dar el Salaam at Mitt Ibom el-Kom.</li> <li>- Massacres and Atrocities Tourism: Donshway Massacre.</li> </ul>
11.	Beheira	<ul style="list-style-type: none"> <li>- Houses and Palaces of Distinguished Characters and Leaders: King Farouk Palace at Edfina.</li> <li>- Wars and Forts Tourism: Orabi Fortress at Edco, Qaitbay Fort at Rasheed.</li> </ul>
12	Alexandria	<ul style="list-style-type: none"> <li>- Horror and Ghost Tourism: Re-simulation of RIA and Sekeena legend.</li> <li>- Houses and Palaces of Distinguished Characters and Leaders: El Montaza Palace, President Gamal Abdel Nasser House, Kaffafis Museum, Villa of Princess Faiza sister of King Farouk, Kurdahi Palace, Baron Palace at Menasha, Antoniades Palace.</li> <li>- Wars, Castles and Forts Tourism: Kaitbay Citadel.</li> <li>- Assassinations and celebrity deaths' Tourism: El-Sadat Museum at Biblioteca Alexandrina.</li> <li>- Memorials Tourism: Navy Memorial.</li> <li>- Tombs Tourism: Latin cemetery tombs , Mostafa Kamel, the Catacomb, Shatby, the Commonwealth military cemeteries at Shatby .</li> </ul>
13.	El Alamein	<ul style="list-style-type: none"> <li>- Wars, Castles and Forts Tourism: El Alamein Military Museum.</li> <li>- Memorials Tourism: Memorial of World War II Military Museum of El Alamein.</li> <li>- Tombs Tourism: Commonwealth Cemeteries , German and Italian cemeteries.</li> </ul>
14.	Matrouh	<ul style="list-style-type: none"> <li>- Wars and Forts Tourism: Rommel Museum.</li> </ul>
15.	Siwa	<ul style="list-style-type: none"> <li>- Cemeteries Tourism: Mountain of the dead ( El Mawta Mount)</li> </ul>
16.	Oases	<ul style="list-style-type: none"> <li>- Tombs Tourism: The Valley of the Golden Mummies Cemeteries at El-Bhareya Oasis, the Pharaohs tombs at El- Dakhla Oasis, Kharga Oasis Albagauat tombs.</li> </ul>
17.	Minya	<ul style="list-style-type: none"> <li>- Tombs Tourism: Tuna El-Gebel Mountain, Bany Hassan tombs.</li> </ul>
18.	Luxor	<ul style="list-style-type: none"> <li>- Horror and Ghost Tourism: Re-simulation of the Pharos curse Legend.</li> <li>- Wars and Forts Tourism: Ramesseum and Habu Temples.</li> <li>- Tombs Tourism: Tmbs of the Valley of the Kings and Queens.</li> </ul>
19.	Aswan	<ul style="list-style-type: none"> <li>- Wars and Forts Tourism: Philea Island.</li> <li>- Cemeteries Tourism: the tombs of the Nobles, Cape City ruins, Aga-Khan Shrine, the anonymous Soldier tomb.</li> </ul>

Source: EL-Manhaly (2015), p. 170.

## 6 RESULTS

The researchers obtained 240 completed questionnaires appropriate for analysis with a response rate of 60%.

Regarding the importance of dark tourism from travel agencies' perspective, the majority of the study sample (97.5%) agreed upon the importance of the role of dark tourism in the enrichment of Egypt tourist map and the increase of tourist demand for the Egyptian product. Furthermore, most respondents (97.5%) agreed on the cooperation importance among the various stakeholders including tour operators, events' sites, hosting community and visitors to develop and benefit from dark tourism demand.

Concerning the inclusion of dark tourism attractions within the programs of travel agencies, 45% of the sample stated that they include the sites of wars, battles and fights. Besides, 42.5% % of the sample includes the cemeteries' sites within their tour programs. Whereas, the rest of the agencies include visits to either the houses of popular personalities and leaders or the memorials sites.

The results also revealed that 45% of the travel agencies stated that there is limited tourist demand for visiting dark tourism attractions with foreigners constituting most of it.

As for the marketing of dark tourism, it was apparent that 97.5 % of the travel agencies possess the intention to participate in the various marketing efforts for dark tourism in Egypt, while the rest refused the idea. The mentioned reasons for that include the unsuitability of sites for tourism, the lack of awareness of this tourism type and the probability of its success in the community, as well as, among the agencies. However, they provided some suggestions for its development and thus increasing the tourist demand for the country. These include:

- Inventory of the most important dark tourism sites in Egypt and developing the infrastructure and the various services necessary to receive tourists.
- Promoting incentive trips with low prices to dark tourism sites in Egypt.
- Increasing the awareness of the importance of dark tourism sites among the local community members.
- Specifying a committee to coordinate efforts between the various stakeholders, the Ministry of Tourism and the Egyptian Tourism Authority in order to shed light on this new type of tourism and take real steps towards its internationally promotion (tourism exhibitions).

## **7 CONCLUSIONS AND DISCUSSION**

Based on the theoretical study of dark tourism and its attractions in Egypt and the results of the questionnaires distributed on a sample of Egyptian travel agencies category (A), it is obvious that although dark tourism is not a mass tourism, it can be promoted and maintained with the necessary infrastructure needed for investment, which could lead to an increased demand and income and thus contributing to the economic development in Egypt. Furthermore, dark tourism helps societies to overcome their painful past and transform it to a strong multi-beneficial tool that realizes the community participation in the tourism industry and recognizes the past mistakes in order to avoid them in the future. In addition, it is apparent that although, Egypt possesses diverse and multiple dark tourism attractions, there is a limited demand for them, as dark tourism doesn't exist on its tourist map from the first place. Therefore, it not included within the travel agencies' programs. Nevertheless, these agencies are aware of the importance of these attractions and their role in attracting tourists to Egypt and diversifying its tourism product. This suggests the cooperation among the various stakeholders in order to increase the demand for dark tourism in Egypt. The demand for dark tourism in Egypt concentrates on sites of wars, battles and fights, as well as, cemeteries' and tombs' sites, which suggests the need for more promotion and development efforts for these sites and the promotion of other dark tourism attractions. Egyptian travel agencies have the intension to participate in these efforts and could play an important role in that field through their contact with the tour operators abroad.

## **8 RECOMMENDATIONS**

From the above conclusions, the following recommendations are suggested:

- Developing new tourism patterns that allow the diversity of the Egyptian tourism product, especially that of "dark tourism", as Egypt numerous sites for this type that can contribute to the excellence and development of the Egyptian tourism product.
- Cooperating with the official tourism associations and the various stakeholders to develop the dark tourism sites in a sound way while retaining their originality in order to attract different segments of tourists.
- Creating an association concerned mainly with following the development and promotion procedures of the various dark tourism sites in order to present a competitive dark tourism product at the global level.

- Collaborating with international institutions and bodies concerned with the development of dark tourism to take advantage of their expertise in formation and marketing of the Egyptian tourism product.
- Determining the sites associated with events and personalities that have an extended history all over the world to be a starting point for attracting international tourists.
- Benefiting from the social networks to reach the largest possible number of tourists around the world.

## 9 AREAS OF FUTURE RESEARCH

Numerous future studies can be carried out in the field of dark tourism. Special dark tourism programs may be designed and internationally marketed, based on the results of tourism marketing research to determine the primary markets for that tourism pattern. There is also a possibility of preparing models of plans for developing and marketing dark tourism sites based on the results of the present study.

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# *AN EVALUATION OF CARIBBEAN DESTINATIONS WEBSITES*

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## **ABSTRACT**

The Internet has proved to be a widespread medium and an integral part of the habits of millions of users throughout the world. An effective online communication strategy is considered nowadays a key element to achieve a competitive advantage in the travel & tourism market, to satisfy actual and potential tourists' information needs in a highly competitive way and to acquire new clients. All the Caribbean countries have implemented some kind of official tourism portal to promote their own destinations. An analysis of these tourism websites has been performed by collecting end-user evaluations and mapping contents and services offered online. The results show the level of quality for the destinations official tourism websites.

**Key Words:** Caribbean, Internet, quality, websites, evaluation, marketing

## **Introduction**

In less than 30 years, the Internet has become the most significant development in communications since the invention of the printing press and has deeply revolutionized the way in which we communicate. Moreover, it has been the fastest growing communications medium ever and most of this diffusion is due to the development of the World Wide Web; its rate of diffusion has been much faster than radio in the 1920s, television in the 1950s and mobile phones in the 1980s (Odlyzko, 2000). For these characteristics the Web has been defined, since the beginning of its mass diffusion, as the Holy Grail of Marketing (Foxworthy 1997). Its actual potential as a marketing tool is greatly enhanced when fully integrated with other functionalities of the Internet,



such as e-mail or public discussion boards, supporting real-time one-to-one and one-to-many communications. The Internet provides features that are especially relevant to the marketing of travel & tourism. Travel is an experiential practice; travellers are not simply buying packages, accommodation, seats, or food and beverages, they are fulfilling fantasies (Archdale 1995). The Internet, with its wealth of information, pictures and multimedia has the capability to provide the appropriate stimuli to favour the purchase of a travel product or service. As the tourism business, like many others, continues its globalization process, the competitive pressure on individual destinations and attractions increases. According to statistics of the World Tourism Organization (WTO, 2015), international tourist arrivals for 2014 exceeded 1138 million. The growing competition, the increasing range of travel markets, products and destinations, as well as the ever more difficult chore of finding new market segments and communicating with them, makes the Internet a valuable tool for marketing travel and tourism (Pollock 1995). This is particularly true for destination marketing, an activity in which the success is mainly due to the ease with which a good supply of information about places, facilities and events is transferred to the visitor (Sheldon 1993).

The Internet has reshaped many facets of travel, including information search and planning (Mills & Law, 2004; Xiang et al., 2008) as well as the purchase of travel-related products (Buhalis & Law, 2008; Werthner & Klein, 1999). Indeed, studies conducted by the Pew Foundation Internet Project (2009) indicate that travel reservations are one of the most popular online activities for American travellers, and that the percentage of US adults who booked or purchased travel products increased by about 250% between 2000 and 2009. In addition, a 2009 report by USTA (2009) indicates that 96.8% of online American travellers use the Internet for travel planning (or online travellers), and 80.3% of online American travellers purchase travel products for pleasure trip purposes. Another characteristic of the tourism industry which makes it dubious is its intangible nature and this can be minimized by providing information via commercial brochures, tourism website etc. Tourists like other customers seek information before travelling and today in the era of internet around 80% of the prospective tourist starts their research on internet, particularly the tourism websites of the place of travel. An effective and well maintained website is the need of the hour. Therefore the Caribbean governments have realized the urgency and need of maintaining their destinations tourism website and hence are spending a huge amount and resources for designing a good website. After globalization and the technological revolution of 1990's particularly the arrival of internet, the scope of tourism has expanded, which further has brought many new opportunities as well as challenges for the tourism and hospitality industry. Internet and tourism goes hand in hand. Today, most people consult online before they plan their travel. Internet is beneficial for both customers as well as suppliers as it is cost effective, geographical boundary less, generates high revenue but still very little research is done on evaluating the parameters for effective tourism websites in the Caribbean. So it is very important to study the

parameters which makes a website effective and helps to promote destinations by attracting tourists.

The Internet has reshaped many facets of travel, including information search and planning (Mills & Law, 2004; Xiang et al., 2008) as well as the purchase of travel-related products (Buhalis & Law, 2008; Werthner & Klein, 1999). Indeed, studies conducted by the Pew Foundation Internet Project (2009) indicate that travel reservations are one of the most popular online activities for American travellers, and that the percentage of US adults who booked or purchased travel products increased by about 250% between 2000 and 2009. In addition, a 2009 report by USTA (2009) indicates that 96.8% of online American travellers use the Internet for travel planning (or online travellers), and 80.3% of online American travellers purchase travel products for pleasure trip purposes. The Internet is one of the most important sources for travel information in that it enables travellers to easily collect information about travel products whenever, wherever, and as much as they want (Hwang et al., 2006; O'Connor, 1999; Pan & Fesenmaier, 2006); additionally, the Internet has empowered travellers to purchase an array of travel products by bypassing traditional intermediaries in the distribution channel (Beldona et al., 2009; Kumar et al., 2004; Lang, 2000; Werthner & Klein, 1999). Thus, online travel companies

such as Expedia.com, Kayak.com, Lastminute.com, Orbitz.com, and Travelocity.com enable travellers to easily check price, search for up-to-date information, purchase last minute or online specials, and communicate directly with sellers and/or other consumers (Jang, 2004; Law & Leung, 2000). Jun et al. (2007) compared different types of travel products travellers purchased and information sources they used (e.g., online, offline and both online and offline). They concluded that accommodations, car rentals and flights are leading travel products that travellers are more likely to search information for and to purchase via the Internet.

There is a multitude of indicators to use in and reasonable literature about evaluating a website. Several domain-specific website evaluation criteria were developed in the past few years. Criteria were developed to evaluate websites dedicated to bookstores, jobs (Terzis & Economides, 2005), museums (Pallas & Economides, 2008), airlines companies (Apostolou & Economides, 2008), ministries (Ataloglou & Economides, 2009). Examining the Webby Awards 2000 data set to understand which factors distinguish highly-rated websites from those that receive poor ratings, (Sinha, Hearst, & Ivory, 2001) evaluated 3000 websites based on six criteria: content, structure & navigation, visual design, functionality, interactivity, and over all experience. They found that the content was by far the best predictor of the overall experience, while visual design was the worst predictor of the overall experience. Targeting Web page designers; Web masters; business owners; and researchers, (Viehland & Zhao, 2008) determined how well New Zealand's top 50 Web sites were following international homepage guidelines based on twelve criteria in three categories – web page design, navigation, and usability. (Mateos, Mera, Miranda Gonzalez, & Lopez, 2001; Miranda Gonzalez & Banegil Palacios, 2004) developed a Web Assessment Index (WAI) which

provided an integrated approach for evaluating websites based on four criteria: accessibility, speed, navigability, and content which were objectively evaluated and each website was given a score out of a 100. (Ooi, Ho, & Amri, 2010) used a list of 10 criteria to evaluate three education service providers' websites in Malaysia. The ten criteria used were: source, layout, accessibility, speed, navigability, content, accuracy, level of details, current information, and appearance. They adopted a binary scoring indicating the existence or non-existence of a criterion. Using six Website evaluation dimensions, (Pallas & Economides, 2008) developed museum's site evaluation framework (MUSEF). The framework used website content, presentation, usability, interactivity, e-service, and technical as its evaluation dimensions. Each dimension contained a number of specific criteria. Sonoma State University developed a set of criteria to evaluate website content (Sonoma State University, 2005). Nielson presented evaluation criteria for websites' interface design (Nielson Norman Group, 2006). Several other authors designed sets of criteria for evaluating website features, such as currency, navigation, authority, accuracy, and coverage (Fisher, Burstein, Lynch, & Lazarenko, 2008; Hackett & Parmanto, 2009; K. H. Kim, Jung, Charles, & Doo-Hee, 2007; Lituchy & Barra, 2008; O' Reilly & Flood, 2008; Schmidt, Cantallops, & dos Santos, 2008; Yang & Chan, 2008).

The quality of a Website is difficult to define and capture but designers, developers, and users feel it when it is missing. Website quality depends on three sets of factors: task-related, performance-related, and development-related factors (Brajnik, 2001). Task-related factors include navigability, presentation quality, and appeal, content and functional adequacy. Performance-related factors include response time, transaction throughput, reliability and robustness. Development-related factors include code complexity, code reliability, code flexibility, portability, page coupling, and modifiability. The Website quality evaluation method (QEM) proposed by (Olsina, Godoy, Lafuente, & Rossi, 1999) is one of the main approaches to assess websites. (Misić & Johnson, 1999) used four factors of Website effectiveness function, navigation, content, and contact information to benchmark the Website of the College of Business at Northern Illinois University against 45 other business schools. We must distinguish between manual and automated approaches for analysing and evaluating websites. Manual evaluation relies on the judgments of individual analysts on certain websites. Speed, rigorous structure, and abundance of data are assured when evaluation is done automatically with software tools (Bauer & Scharl, 2000).

The decision of the tourist is influenced by two factors internal experiences i.e. their own past experience and the external information which we get on internet, websites or online blogs, brochures etc. (Peterson, Balasubramanian & Bronenberg, 1997). With the ever increasing use of the internet it has become very important for the countries to maintain a well-designed and competent website (Kaplanidou & Vogt, 2004). A well designed and maintained website will reach to a larger number of people which will be more beneficial for the businesses (English Tourism Council, 2002; Rita, 2000). Website can be used as a marketing tool; it increases the brand identity

and also helps in market research (Armstrong & Kotler, 2009). The prime role of a website is to provide complete information of the product and company to its consumer (Hallerman, 2009). Now with the help of tourism websites, people can easily have access to all the information at a destination like accommodation, transportation, tours, beach activities etc. They can get in touch with the suppliers and service providers directly which brings down the intermediary cost. Hence it becomes cost effective and time saving (Antonioli, Magda & Baggio, 2002). Direct contact making, quick research and response, low distribution cost, and opportunity to buy the best deal by comparing the prices are some of the important factors, why people prefer to use the internet over traditional purchasing (Eisenberg & Eisenberg, 2005). The success of website is dependent on its functionality and usability (Lu & Yeung, 1988). The characteristics of website which makes it an effective website are clear, adequate and updated information, user friendly and easy to understand, quick response to queries and feedbacks (Hamil & Gregory, 1997). Factors crucial for the success of tourism websites are the provision of maps, visa information, do's and don'ts of the place, information about currency, distances, culture, weather etc. and also the availability of sufficient photographs and videos (Zhou & DeSantis, 2005). The tourism websites should not be static, boring or dull instead they should be innovative and attractive (Lazariuis et al., 2002; Albert et al., 2004). Different researchers have felt the need and importance of evaluating the websites. Website evaluation can be described as a process of understanding the user requirements and ensuring the website provides relevant and updated information which is helpful for the users (US Dept of Health and Human Services, 2002). The websites must not be overloaded with the information because excessive information can create a lot of confusion and can drop the quality of decision taken by the people (Biswas, 2004).

## **METHODOLOGY**

By summarizing the ideas and the studies of a number of practitioners and researchers it is possible to compile a list of elements that are essential to the development of a successful web site (Morrison et al., 2004; Nielsen, 1994; Nielsen & Molich, 1990; Rachman & Buchanan, 1999a, 1999b). The list of the criteria based on these authors' works for the evaluation of websites is given in the following Table 1.

Table 1. Elements of a successful website

No.	Evaluative statement
1	Strategies and objectives must be clearly stated and clearly understandable by the visitors.
2	The target audience must be identified and the site must meet the needs expressed by it.
3	Features that make possible an interaction between the user and the organization must be present and designed in a fully usable way.
4	A rational structure supported by navigation aids must avoid any risk of confusion and allow users to browse all of the sections with great ease.
5	Other features adding functionality or aesthetic appeal must be designed in a coherent way and must be functional to the site contents.
6	Informational content must be presented in a readable and correct way (colors, size, fonts, grammar, style etc.). The site must exhibit credibility, relevance and accuracy of the information presented
7	Content of high value must be provided to the users to encourage them to explore further and to return regularly to the site.
8	Regular and frequent maintenance to add, revise or remove content and to correct errors and malfunctions must be accomplished.
9	Promotion of the site must take place using an integrated approach that incorporates traditional media and online resources.
10	The financial, human and physical resources required for the Internet marketing effort must be given the correct consideration and planned and controlled in a reasonable way.

Based on these characteristics a quality index has been developed that has two major components. The first is the user evaluation of the website content and the second is evaluation of the website's functionality. Combining these two use-based scales it is possible to derive a general quality index defined as (Baggio, 2003):

## QUALITY INDEX = CONTENT EVALUATION X FUNCTIONALITY EVALUATION

The number of evaluators (i.e., the sample size) is an important element to derive a significant result from these assessments. Classical statistical procedures have well-grounded methodologies for estimating the ideal size of a sample depending on the population parameters. The range is typically of the order of magnitude of about 102 – 103. However, it has been shown (Antonioli Corigliano & Baggio, 2006) that the significance of these types of assessments can be quite satisfactory even employing a limited sample of evaluators. In fact, for this present case of 103 evaluators, the confidence interval for the results presented here can be estimated to be around 5%. The evaluators were asked to check the existence of the items on the websites under analysis and to assign a score (from 0 = min to 5 = max) taking into account the usability and the completeness of the single functionalities (Antonioli Corigliano & Baggio, 2004; Baggio, 2003).

In this study twenty websites of the Caribbean islands have been assessed using a methodology derived from these considerations. A representative sample of end-users 103 students completed a questionnaire evaluating the websites based on the above characteristics. These students were given a lecture by the researcher about website evaluation then spent a class session looking at the Caribbean websites. The next class session was then used to do the website evaluations and completing the evaluation form. Microsoft Excel version 10 was used for the statistical analysis of the data.

## RESULTS AND DISCUSSIONS

The results of this survey show that, even considering the relatively young age of these implementations, these websites are designed outstandingly but some of them can be improved. While the potential of the Internet has been much discussed a few of the websites do not meet their potential. Users' evaluations and mapping of contents and services offered attain a generally medium quality index, mainly in the area of the customer relationship functionalities. Given the relationship between online buyers and website quality, some of the countries do not take full advantage of the e-commerce capabilities of the Internet, thus risking loss of significant tourism business for their destinations. In performing the analysis a quality index has been defined by combining user evaluations and level of contents and services provided.

The Internet has had a substantial impact on the purchase of travel products, and in particular destinations, airline and hotel reservations; however, a wide array of travel products are now sold online, including car rental reservations, tickets to attractions and events, cruise reservations and tickets to sporting events. The results of this study as can be seen in Table 2. Using the Quality Index Value, shows that the Caribbean destinations websites with the best quality include Jamaica

(M=18.5), the British Virgin Islands (M=18.26) and the Cayman Islands (M=18.10). Grenada was the only destination in the second tier (M=17.11) and 5 destinations in the third tier with mean scores between 16 and 17. The bottom tier consist of three islands, Bonaire (M=12.37), Curacao (M=12.85) and Puerto Rico (M=12.78). The island of Cuba score (M=8.47) was significantly less than all the other islands.

Table 2. Caribbean Destinations Websites Quality Index

Destination	Fuctionality (Mean)	Content (Mean)	Quality Index Value
Antigua	4.01	4.16	16.68
Anguilla	4.22	3.92	16.53
Aruba	4.08	4.16	16.97
Barbados	3.95	3.98	15.72
Bonaire	3.52	3.51	12.37
British Virgin Islands	4.27	4.28	18.26
Cayman Islands	4.18	4.33	18.10
Cuba	2.89	2.93	8.47
Curacao	3.64	3.53	12.85
Dominica	4.01	3.97	15.91
Grenada	4.10	4.17	17.11
Guadeloupe	3.59	3.84	13.8
Jamaica	4.31	4.29	18.50
Martnique	3.85	3.99	15.37
Montserrat	3.8	3.85	14.63
Puerto Rico	3.51	3.64	12.78
St.Kitts & Nevis	3.88	3.99	15.49
St.Lucia	4.14	3.94	16.31
St.Vincent	4.07	4.06	16.52
St.Maarten	3.74	3.57	13.36

Several practical implications can be drawn for the Caribbean destinations and online travel and tourism businesses. First, it is posited that businesses promoting tourism products online need to consider the 'cluster' of buying behaviours when developing travel related products. Since online travellers would be likely to purchase similar types of travel products in terms of the complexity degree and the function of the product, business marketers need to identify the 'cluster' of purchasing behaviours of the traveller, and then provide a customized set of online travel products. In addition, destination marketers need to provide different types of tools to support the different purchasing groups as they differ substantially in terms of Internet knowledge, innovativeness, satisfaction, usage and the information sources they use.

This study provides a new angle to the understanding of communication effectiveness on Caribbean destination websites. Processing fluency indicates that customers only can process a rational amount of messages on the destination websites. Therefore, marketers are advised to use strategies which limit the amount of messages communicated by the website features. The priority rankings of the four primary website characteristics are 1) information quality, 2) ease of use, 3) interactivity, and 4) visual attractiveness. High-quality information content serves as the most important fluency signal. Top priority for marketers is the importance of comprehensive, useful, timely, and easy-to-comprehend travel information to attract potential customers. Customers who visit a destination website have questions they are seeking to answer and will be disappointed if the website looks great, but does not answer their questions clearly and accurately. Marketers are advised to always keep in mind that the primary objective of customers is high-quality tourism information, and not fancy website design features. .

Ease of use functions facilitate customers' ability to process information content with less effort, such as simple layout, minimal clicks to locate desired information, and clearly separated categories for different groups of tourists, etc. Interactivity functions sometime provide more effective communication than text content on its own because these features help customers understand information faster and more accurately. Although visual attractiveness has been found to spur customers' interest to browse the tourism website, visual attractiveness on its own has a limited impact on processing fluency. In past studies of destination websites, the impact of visual attractiveness on website destination has probably been exaggerated. Appealing website design is like icing on the cake, but cannot replace the cake itself, namely high-quality specific and accurate travel information.

Based on our findings we recommend that Caribbean destinations should act collaboratively with different hotels, travel agents, transport providers, ancillary service providers such as police, hospitals, fire emergency etc. to provide information about them on their website so, as to make website more tourist friendly. Different people from different countries understand different languages, some of the destinations websites were presented in one language, and translation facility can help to reduce this gap. So a tourism website should provide provision of multi-language translation. All the important and necessary information should be available and accessed easily so they should be clearly available on the home page. A person sitting thousands of miles away do not have an idea of exact distance, time to travel from one place to another, weather condition, do's and don'ts, permits required. All the necessary information should be provided on the website so that travellers would not face any inconvenience and would further build their trust.



## **Conclusion**

Caribbean countries are among the most popular tourist destinations in the world and the promotion of their resources is a crucial activity, mainly performed by the various national tourism organizations. The Internet and the Web have proved, in the last few years, to be a widespread communication and business environment and have rapidly become an important part of the habits of millions of users. An effective online communication strategy is considered nowadays a key element to achieve a competitive advantage on the market, to satisfy actual and potential tourists' information needs in a highly competitive way and to acquire new clients. All the Caribbean countries have implemented some kind of official Internet tourism portal to promote their own destination. An analysis of these official tourism websites has been performed collecting end-user evaluations and mapping contents and services offered online. Some tourists only have a slight idea of where they want to go on a vacation when planning starts. Such tourists or their travel partners are likely to look for information for making a final travel decision. As the web becomes an increasingly popular information source, tourism destination websites can play a critical role in destination choice. The Caribbean Islands Destinations websites need to remain reliable and up-to-date; most of them are technically satisfactory.

The main limitation of studies such as the present one on the evaluations of a website is the lack of common and generally accepted assessment principles. Many different research works propose different although similar approaches (see for example, many of the papers in Frew 2004). A more uniform methodology could prove extremely valuable in comparing the evaluations performed by different groups in different conditions, thus increasing the usefulness of the approach and of the indications that can be derived from such works. The website of a tourism destination can give a competitive advantage especially in the main tourism spender countries, where the Internet technologies have nowadays reached a real mass diffusion. The implications of a methodology to assess the quality of a website as perceived by the casual user are very important. Even though theories about design and implementation techniques of usable software products exist, without doubt the success of a website is guided by the appreciation of the users and their criteria are the most important determinants.

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# *THE COSMOLOGY OF HERITAGE IN LATIN AMERICA: FROM EXPLORATION TOWARDS INDEBTNESS.*

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## **Abstract**

In the present essay review we discuss to what extent heritage does not play an ideological function invisibilising the real causes of events. In some respects, anthropology as well as other social sciences instilled the needs “of being there” which was conducive to the logic of exploitation introduced by colonialism. Today this submission is successfully achieved by means of heritage. What is the position of Latin America in this stage?. From the sense of exploration of 19s century towards financial indebtness, West has created an allegory of Otherness in order for its conquest to be ideologically legitimated.

**Key Words:** Heritage, Latin America, Tourism, Mobilities

## **Introduction**

The politics of heritage offer a commotized version of culture that covers real history. As long as 17s and 19s centuries, Europe developed a closed image of Otherness that ideologically engaged



the Old Continent with new cultures and economies. In fact, colonialism was possible not only because of the advance of science, even anthropology, but also because natives were dissuaded on European supremacy. In this stage, the configuration of new states, their cities and borderlands were underpinned under the *discourse of rationality*. Placed at the top of a social pyramid which is based on the material level of production, Europe represented a superior ladder of civilized culture that advanced in fields the rest of humankind failed. If social Darwinism, even proclaiming by the superiority of Anglos over other ethnicities, illuminated the first steps of many disciplines as psychology, sociology and anthropology, one might realize that social science resulted from colonialism and its project of nation-state (Bauman, 2013). The discourse of rationality emphasized not only in reason as the pillar of progress, but also presented a unilineal vision of history. That way, it was associated to a much deeper logic of mean-and-ends. The degree of instrumentality, applied on a diachronic view of pastime, envisaged that rational planning would leave natives towards progress. Once the project of colonialism collapsed after 60s decade, its ideological message persisted in the fields of heritage and heritage tourism. Supported by the theory of development, many peripheral nations asked to IMF and World Bank for loans to improve their situation. Stereotyped as “underdeveloped” economies, Western ideology instilled in them the needs of overcoming towards a superior ladder of productive pyramid. Of course, needless to say, not only these countries failed to adopt rational programs of development but higher rates of interests worsened their distribution of wealth. The theory of development as it was envisaged in North-Hemisphere was widely criticized worldwide. In response to these critics, they alluded that the cultural asymmetries between First and Third world was the main reason behind failures in adopting the proposed models. Once again, rationality now conjoined to tourism served as an ideological mechanism of control for Latin America and other peripheral continents. This essay review discusses the conceptual limitations as well as evolution of colonialism which passed from “the notion of being there”, claimed by fieldworkers, to heritage tourism where cultures are commoditized.

### **Initial Assessment**

The onset of 19s century and effects of industrialism instilled in the first anthropologists the belief that the disappearance of primitive world would be irreversible. Not only their kinship, customs, lore and traditional forms of organizations, but the social trust would be undermined by complex new more secular forms of production (Durkheim, 1976; Mauss 1979). Once colonial powers expanded their hegemony, the primitive sources of trusts plummeted. These newcomers prohibited aborigines to make the war against their neighbors, in which case a romanticized image of the native emerged (Guidotti Hernandez 2011). The idea of “noble savage” as an outstanding figure which maintained far from industrial corruption invaded the literature and social imaginary of West (Fryd 1995). The problem of heritage for academicians was enrooted in the needs of

discovery and protection that cemented the possibility to paternalize non-Western cultures (Korstanje 2012). As Harris puts it, concerned in questions of heritage, gift-exchange, and inheritance the first ethnologists were lawyers (Harris, 2006). The presence of law as well as the jargon enrooted in legal jurisprudence was unquestionable in their incipient studies. One of the aspects that defined the field-work of anthropology was the efficacy to collect the lore, customs and object of primitive societies before their disappearance. Indeed, the “Other”, far from being an independent entity, was subordinated to European-gaze. The European paternalism envisaged the world as an amalgam of different cultures, which evolved in different ladders depending on their economies or ways of production. Europe was conceived as the most evolutionary and refined form of civilization respecting to these “Others” who had not skills in arts and trade. This seems to be the context, where patrimony and heritage surface. From that moment on, the relation of both with development took a material connotation that suggested further trade and commercialization would be beneficial for natives. From this viewpoint, native’s backwardness was explained by their disinterest for economic progress, as it was imagined by Europeans’ travellers. If the colonial order connected the center with its periphery, travels paved the ways for the acceleration of colonization (Korstanje, 2012).

The rise and consolidation of nation-states was centered on a much deeper fiscal efficacy of administration to encompass mobilities within the soil (Hannam, Sheller & Urry 2006; Urry, 2012). However, a closer look validates the thesis that we live in an immobile world, which was cemented by disciplinary mechanisms of control. Originally aimed at disciplining “the Other” in Americas, nation-states centered their hegemony posing fabricated boundaries into nomads and other ethnicities into a pervasive identity. As Guidotti-Hernandez (2011) observed, to the violence suffered by natives we need to add another unspeakable violence which posed a fabricated narrative to be consumed by international visitors. The problem of heritage relates to the fact some events are blotted out as they really occurred. Nation states fabricated heritage to produce an ideological message to their new members in order to dissuade the process of homogenization they suffered were the best of possible worlds. That way, some ethnicities were forced to live together under the umbrella of same government. Meanwhile, these new leviathans appealed to construct a shared identity in order for conflict to be undermined.

In Latin America, the project of State was cloned from United States. Former president of Argentina Domingo Faustino Sarmiento experienced the myth of desert while touring US. This metaphor will shed light on the needs to connect pathways in order to stimulate the local production in Argentina. Enthralled as the cradle of civilization, Sarmiento adheres to America as a superior form of government which it is necessary to emulate. Trade, the respect for law, technological breakthroughs are some of the innovation that captivates Sarmiento’s attention (Zusman, 2010). This means that the concept of mobility as it has been studied by Sheller or Urry is enrooted in the configuration of nationhood. However, here is where the paradox lies. At the time,

state exerted considerable violence to discipline aborigines to change old customs of hunters and gatherers to be subject to a new territory, mobility of goods allowed the construction of necessary infrastructure to consolidate the project of nationhood. While mobility was encouraged in one direction, immobility of aborigines was used as a mechanism of control. Nowadays, the quest of “otherness” is engaged to travels and the ideological core of Nation-state promoted by the expansion of tourism industry (Korstanje & Muñoz de Escalona, 2013).

In earlier approaches Korstanje noted that the conquest of Americas was fraught of chaos, violence and mass-death, which was ultimately sublimated not only in museums and other tourist attractions, but also in the name of streets. This happens because heritage is war by other means. Miguel Angel Centeno argues convincingly that the success of nation-states to develop efficient mechanisms to yield wealth in USA and Europe was related to their capacities to control their fiscal deficit. The supremacy of Europe over the world can be explained not only by the technological breakthroughs developed in the interwar period but in the fact they have participated actively in two “total wars”. The influence of total wars in the social institutions can be abridged as follows,

- a) The capacity to extract financial and human resources moving them to achieve a collective goal
- b) The centralization of financial capital to enhance the loyalties of diverse sectors of society
- c) A common identity

Total wars produce more richer and powerful states. The fiscal capacity of nations is strengthened by the total wars (Centeno, 2002). Centeno goes on to say,

*“The destructive capacity of war is self-evident. Less so is the manner in which war, or more accurately, the process of going to war, can be constructive. War is rejuvenating. The demands of war create opportunities for innovation and adaptation. Wars help build the institutional basis of modern states by requiring a degree of organization and efficiency that only new political structures could provide.”* (Centeno, 2002: 101)

The process of ethno-genesis that facilitated the configuration of nation-hood organized behaviors into specific contours which were drawn by means of warfare, violence and expropriation. At the time Foucault situates under the lens of scrutiny the concept of “economy of truth” it suggests some beliefs, ideas, and feelings were orchestrated into an all-encompassing discourse that produced the sense of reality. Far from what historians guess, the legitimacy of state is based on the abilities of elite to forge a shared notion of truth, *history*. Whether we affirm some theories gain recognition over others, or some events are part of history, we are reaching only a partial side of reality (Foucault, 1977; 2003). One might speculate that the idea of heritage, at least, should be revisited. Whatever the case may be, in a seminal recent book, R. Tzanelli (2014) describes the complexity of capitalism to produce hypostatized landscapes of consumption, where the “other”

who does not look like me is being exploited according to imagines, allegories and discourses externally delineated by West. Similarly to Colonial legacy, “The otherness” is constructed in order to be subordinated to Europeanness. It is impossible to imagine the legitimacy of nation-state should be divorced from mobilities. While accommodated classes may enjoy a World, which is based on tourism and hedonism, the Work-Force is pressed to live in the periphery. Whenever international events, that draw the attention of the World are held in countries of Third World, thousand of claimers launch to street to protest against local governments. Tzanelli adheres to the thesis that advance of capitalism not only has not improved the living conditions of locals, but it triggers old discrepancies between colonial legacy and modernity. There is a co-dependency between centre and its periphery that can be continued by an alternation of what Tzanelli dubbed, “cosmographies of riches” and “cosmologies of desire”. The discourse of centrality is formed by a hierarchical system of symbols, thoughts and beliefs consolidated by social networks. This remains even after the independence evoked not only by the needs of peripheral zones to be part of sacred centre, but in a profound desire to get the foreign cosmographies of riches. Not surprisingly, this explains why peripheral fascination for tourists coming from developed-nations. The original gift is exchanged between civilized and uncivilized worlds (Tzanelli 2014).

Last but not least, Miguel Angel Centeno gave hints on the problems of aristocracies in Latin America to control “their internal rich ethnical kaleidoscope”. As semi-leviathans, where the main threat is not the neighboring states, but the internal enemy which is depicted by the aborigine, Latin Americans failed to regulate an efficient fiscal balance. Therefore, they were historically pressed to ask for international loans and financial assistance abroad. While European states celebrated two Total Wars that improved notably their fiscal discipline, Latin Americans have developed “extractive institutions” aimed at exploiting natives instead of consolidating a shared sentiment of nation. As a result of this, the different Creole elites were accustomed not to direct the violence against other states simply because there were not serious ethnic incompatibilities. Unlike Europeans, not only they shared the same idiosyncrasy but a common language, customs and heritage (Centeno 2002). What is the role of heritage in this process?.

### **Tourism and Heritage**

As already discussed, tourism and heritage now seems to be inextricably intertwined. Tourism scholars echo the assumptions that fresh incomes generated by this industry alleviate the poverty of natives or their living conditions. A fairer distribution of wealth, experts and public account balance give to community a substantial economic improvement. Tourism, of course, can help in such a stage. One of the benefits, these experts adhere, of tourism consists in its ability to exploit intangible assets (as heritage and patrimony) which have limited costs for investors. In parallel, abandoned cities or communities or in bias of destruction can be revitalized by the introduction of

heritage. The discourse of patrimony should be understood as an effective instrument to boost economies, communities, or even cultures. What are the commonalities of first ethnologists and modern tourism policy makers?.

At time of entering in the field, ethnographers defied the classic conception of science which experimented at desks or in controlled conditions. B. Malinowski, the founder of modern ethnography, acknowledged a clear gap between what people overtly say and finally do. Therefore, for social scientists, the needs of moving beyond where the native laid, were associated to the idea of “being there” to validate empirically what senses often captivate.

Changing the epistemological basis of discipline, Malinowski and his seminal studies showed the importance of fieldwork to expand understanding of cultures. In this vein, two main assumptions cemented the western-gaze, the concern for some cultures disappearance was conjoined to situate the supremacy of Europe as an unquestionable truth. It can be found in texts authored by many founding parents of the discipline as Tylor, Boas, Durkheim, Mauss, Radcliffe-Brown, Malinowski Evans-Pritchard and other founding parents (Radcliffe-Brown, 1975) (Pritchard, 1977) (Mauss, 1979) (Boas, 1982) (Malinowski, 1986) (Tylor, 1995) (Durkheim, 2003). However, this sentiment of protection resulted in an uncanny obsession to understand (not to correct) the lives of these nonwhite others. Instead of correcting the factors that lead *Imperial powers* to exploit the periphery, heritage became in a social institution that mediate between the disciplinary violence of Europe and natives’ suffering. This does not mean that anthropology was conducive to imperial order, but many of the produced knowledge served for colonial administrators to discipline “indigenous customs”. This romantic view of the world, not only facilitated the expansion of colonialism worldwide, but facilitated the conditions for the rise of anthropology as an academic discipline. Doubtless, in this process, the concept of backwardness and wealth played a crucial role.

As the previous argument given, between 1975 and 1985 two senior scholars, J Heytens (1978) and Gray (1982) used the term *patrimony* to denote *development*. In this respect, tourism enables social capital to optimize wealth and resources to the extent to attract more capital investment which produces a virtuous circle. Underpinned by the proposition that further tourism equals to further development, scholarship in tourism and hospitality adopted a material conception of patrimony, as a new valuable resource to exploit that may very well help societies or human groups historically oppressed by nation-states (Comaroff & Comaroff, 2009).

The interest for the *Other* corresponds with the expansion and consolidation of Empires that transformed not only the condition of production and consumption (trade), but the passage from inner-centered view to the Other-oriented view. The cosmology of Protestantism that focused on inner-life set the pace to the concept of *Other* whenever the needs of new markets arise. At a first glimpse, civilizations have cyclically alternated three types of cultural archetypes which are, tradition-directed, inner-directed and Other-directed. Riesman acknowledges that tradition

oriented subtype was ancient and rule-abiding organizations where social change rarely evolves. Rather, inner-directed societies are characterized by an internal potential to behave according to the rules of religion. At the same time, the affordable goods to consume requested for new demand, the inner-directed type passed to Other-oriented type. Industrialism revolutionized not only the ways of conceiving economy, but also introduced the “Other’s view” to validate the self (Riesman, 2001). Following Riesman, it is not far-fetched to confirm that the obsession of heritage as the quest for Other’s culture surfaces in context of global market expansion.

### **Latin America and the problem of identity**

In Latin America, scholars ushered the idea of patrimony in order to preserve landscapes, environments or with others sustainable purposes. Local resources, unless otherwise resolved, should be protected from the exploitation or the interests of market. That way, the theory of patrimony suggests, natives receive the good (eluding the negative) effects of tourism. At a second viewpoint, heritage plays a crucial role by cementing the local identity. Locals not only acquire a self-consciousness that will facilitate potential negotiations respecting to the proposed programs, but they administer their own resources (Vitry, 2003) (Aguirre, 2004) (Dos-Santos and Antonini, 2004) (Mondino, 2004) (Espeitx, 2004) (Toselli, 2006). As Korstanje pointed out, though in different contexts of production and times, the spirit of colonial order respecting how the “other” is constructed, lingers (Korstanje 2012). It seems worthy noting that the channels for scientific discovery and “the concept of the Other”, are inextricably linked. The empirical-research findings in tourism fields, far from questioning this connection, validate earlier assumptions in regards to heritage. While tourists seek authenticity as a new form of escapement from the alienatory atmosphere of greater cities, natives offer their culture as a product to be gazed. In this vein, Dean MacCannell and other followers offered a good description of the role of tourism in a society of mass-consumption. Maccannell conceives that tourism consolidated just after the mid of XXth century, or the end of WWII. Not only the expansion of industrialism, which means a set of benefits for workers as less working hours and salaries increase but the technological breakthrough that triggered mobilities were responsible from the inception of tourism. There was nothing like an ancient form of tourism, Maccannell notes. Taking his cue from the sociology of Marx, Durkheim, and Goffman, Maccannell argues that tourism and staged-authenticity work in conjoint in order for the society not to collapse. If totem is a sacred-object that confers a political authority to chieftdom in aboriginal cultures, tourism fulfills the gap between citizens and their institutions which was enlarged by the alienation lay people face. The current industrial system of production is finely-ingrained to expropriate workers from part of their wages. A whole portion of earned salaries is spent to leisure activities, even in consuming tourism. MacCannell believes, industrialism forged a “tourist consciousness” that revitalizes the glitches and deprivations produced by economy. Tourism would be a type of totem for industrial societies that mediates

among citizens, officials and their institutions. In this context, tourism, like a chamanized totem in primitive communities, revitalizes psychological frustrations and alienation proper of urban societies. Not surprisingly, Maccannell adds, Marx was in the correct side at denouncing the oppression suffered by the work-force. Nonetheless, leisure, far from being an ideological mechanism of control (as in whole Marxism), prevents the social disintegration (Maccannell, 1976; 1984). Over recent years, he was concerned by the lack of ethics in tourism consumption. Coalescing contributions of Giddens with Derrida, he points out that globalization entails to type of mobilities. Nomads who are defined as forged-migrants are pitted against tourists who are encouraged to consume landscapes and exotic cultures. Since tourists are conferred by a certain degree of freedom, this leads them to think they are part of a privilege class, sentiment that is reinforced by the quest of “the local other”. Reluctant to contact others, tourists affirm their own self-esteem enjoying the precarious conditions where natives live. If this is not controlled tourism may produce a progressive process of dehumanization (Maccannell, 1973; 1976, 1984; 1988; 1992; 2001; 2009; 2011; 2012).

It is interesting to discuss to what extent, the discourse of heritage adopted by Latin America, never left behind the idea of rationality, as it was formulated by the founding parents of anthropology (Korstanje 2012). The discourse arrived to “periphery” in the same way, connecting to already-existent ethnicities to produce commodities which are offered to international demand of tourists, most of them coming from the same Imperial Centre (Tzanelli 2014; Buzinde & Santos 2009; Korstanje, 2012). The social trauma engendered by colonialism is invisibilized into an ethnic product which is visually consumed by first-class tourists. The Other (noble savage) is conceived in opposition to civilized European. While Europeans have reached their stage of civilization because of trade, the legal jurisprudence which is based in the principle of right and property and an organized ways for concentrating derived surplus, natives developed economies of subsistence (Posner, 1983). This allegory suggests that problems of international commerce are fixed by further investment. Therefore, aborigines who have been pressed to live in peripheral and desert areas believe in the market as a platform to launch towards prosperity. The needs of revitalizing tourists destinations by the adoption of loans and international financial aid not only validates this assumption, but aggravates economic problems simply because solicitant are unable to accrue their higher tax of interest imposed by central nations. This is exactly the resulted denounce issued by sociologists of development as Escobar (1997) Viola (2000) and Esteva (2000). Historically, the term development was coined after American President Henry Truman in 1949, when he claimed on the needs of helping others towards the trace of development. From that moment onwards, the world was divided in two, developed and underdeveloped nations. At a first glimpse, pundits asserted that development would be helpful in contributing to enhance the living conditions of underdeveloped groups. The financial aid was the touchstone in order for West to expand their cultural values to the rest of the world. Needless to say, things do not turned out as planned. Financial assistance was issued without any type of control to governments which failed to obtain

fairer levels of wealth distribution. Instead of accepting the liability, international business organizations as World Bank, International Monetary Funds and Development Bank chose for using a blaming the victim tactic. They, rather, replied that cultural incompatibilities between developed and underdeveloped cultures were the main reason that explains why the original promise of theory of development diluted (Esteva 2000; Escobar 1997). The project of development was accompanied by globalization in many senses.

As Mc Michael alerted, Europe colonized the world (even South America) by the tergiversation of allegories, which continues up to date. The exploitation of the non-European “Others” had a pervasive nature. The process of decolonization, centuries later, witnessed the rise of demands of periphery in order for central powers to allow an autonomous government. The rights of democracy becomes in a universal claim. Mc-Michael explains that imperial powers alluded to the theory of “development” to maintain the old colonial borders. Now violence sets the pace to financial dependency. The WWII end conjoined to Truman’s administration led the United States to implement a wide range credit system to save the world from Communism. This program mushroomed to become in the development theory. However, this financial aid brought modification in the system of agriculture to more intensive methods. This ruined the condition of farmers who were pressed to migrate to larger urban cities. Furthermore, the imposition of new borders post WWII forced to many ethnicities to live with others under the hegemony of nation-state. This resulted in a lot of ethnic cleansing, conflicts and warfare that obscured the original ends of financial aid programs issued by IMF or World Bank. Undoubtedly, the inconsistencies of World Bank in administering the development-related programs not only were admitted but also it woke up some nationalist reactions in the non-aligned countries. To restore the order, a new supermarket revolution surfaced: *globalization*. This stage, characterized by a decentralized production, undermined the barriers of nation-states globalizing investments in those countries were working condition were more convenient for capital-owner. In this vein, two alarming situations were found. An increase in the unemployment and the decline of unionization in the North was accompanied with the arrival of international business corporations seduced by the low-cost of workers in South (Mc Michael, 2012). It reveals a clear contradiction, which remains unchecked. While global tourists enjoy from all legal conditions to travel in quest of exotic landscapes and cultures, nation-states are subject to financial dependency in regards to the financial centers. The strength-hold of this submission remains in the role played by rationality as well as how Europeanness has been constructed.

## **Conclusion**

Today, the industry of tourism monopolizes the meaning of heritage sites, as well as the channels of consumption. Millions tourists travel year by year looking outstanding experiences, open to the



“Other” who does not look like me. Cultural tourism and heritage have played a crucial role in integrating local economies otherwise would have plummeted. Though this seems to be the positive aspect of heritage, a dark side remains unchecked. The concept of heritage as we know now resulted from the bloody colonial past, which was accompanied and validated by Science. Not surprisingly, fieldworkers felt the needs to travel abroad to validate their hypothesis, ethnography and anthropology showed epistemologically the importance of “being there” to observe natives. Undoubtedly, the expansion of nation-state originally was superseded to the construction of ways, infrastructure, and adoption of new technologies in transport and mobility fields. At this stage, the concept of “otherness” served ideologically to engage main economies to the periphery. This co-dependency, far from what some scholars preclude, still is a key factor of submission in our days. Some decades later, to be precise after the end of WWII, the theory of development cemented not only this financial asymmetry between have and have-nots, but convinced the World, financial assistance would be a good resource towards development. Though things turned out differently than planned, spin-doctors of capitalism proposed *the cultural attachment of rationality* as the main reason of such a failure. We have debated hotly that how the concept of being there coined by ethnologists and science in times of colonial order set the pace to heritage consuming in the contemporary world. All these plans would never be materialized by the allegories of maps, and travels enthralled during 17, 18 and 19<sup>th</sup> centuries. Albeit mobility was the ideological heart of nation-state, no less true is that new setting is questioning that tourism and the industry of heritage are dying. Terrorism not only targeted tourist destinations and heritage sites to produce political instability, serious financial crisis in US has affected seriously the capacity of workers to pay for holidays. If our parents saved all year to spend in their holidays, we are now soliciting to banks for loans to pay for dream holiday.

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## **MEDICAL TOURISM AND NIGERIA-INDIA RELATIONS**

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### **ABSTRACT**

The paper examines the growing phenomenon of medical tourism in Nigeria-India relations. It discusses the evolving relationship between Nigeria and India and the growing presence of Indian investments in the Nigerian medical sector. The attraction of Nigerians to Indian hospitals is to seek quality and cost effective healthcare services. This has been necessitated by mismanagement resulting in the under-development of the health sector in Nigeria. India on the other hand has emerged as a major health provider because of its ability to offer 'first-class treatment at Third World prices'. While India gains from inflow of a large number of Nigerian medical tourists, Nigeria loses from the outflow medical tourists due to the resultant cash flight. The paper also discussed the challenges of medical tourism sector in India. These include complex visa procedures, lack of insurance covers, poor airport facilities to cater for patients who arrive with critical conditions and accommodation challenges. Nigeria and India relations can be further strengthened for mutual benefits by expanding the partnership in the medical sector. The recent inflow of Indian medical centres into Nigeria, such as the Apollo Clinics, Primus hospital, Vedic Lifecare Clinic, Mecure Healthcare Services Ltd, amongst others, provides the foundation for expanding partnership in this sector. That notwithstanding the number of Nigerians visiting Indian for medical tourism remains huge. Accordingly, the paper concludes by recommending an increased role on the part of the

Nigerian government in improving healthcare service delivery in the country. Considering the huge prospects in the health sector, the paper also recommends that Nigerian and Indian entrepreneurs should partner and invest massively in the provision of quality, affordable and accessible healthcare services in Nigeria.

**Key Words:** Medical, Tourism, Nigeria, India

## INTRODUCTION

Medical tourism is a phrase that is commonly used to describe the phenomenon of foreign patients seeking healthcare in another country at better equipped hospitals and at medical fees comparatively cheaper than in their home countries. In other words, medical tourism refers to “visit by overseas patients for medical treatment and relaxation” (Shanmugam, 2013, p.1). The term medical tourism is an amalgamation of two distinct services - healthcare and tourism. The reality, however, is that it is difficult to associate the word tourism with chemotherapy, heart surgery, kidney transplant and other related treatment of chronic diseases. The World Tourism Organization (1999) defines tourists as people who “travel to and stay in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited. From the above, it can be deduced that tourism involves particular activities selected by choice and undertaken outside the home. Accordingly, medical tourism has emerged as a form of travel activity undertaken for medical purposes and rest.

Compared to other forms of tourism, namely leisure tourism, winter tourism, summer tourism and mass tourism; medical tourism, which is a form of adjectival tourism, is a recent phenomenon. Adjectival tourism refers to the numerous specialty travel forms of tourism that have emerged over the years, each with its own adjective. Many of these terms have come into common use by the tourism industry and academics. Apart from medical tourism, other examples of the more common emerging adjectival tourism markets include Agritourism, Culinary tourism, Cultural tourism, Ecotourism, Geotourism, Extreme tourism, Heritage tourism, Medical tourism, Nautical tourism, Pop-culture tourism, Religious tourism, Slum tourism, War tourism, Sex tourism, and Wildlife tourism (Gbadebo and Adedeji, 2013, p.13). Apart from these, other emerging forms of tourism include sustainable tourism and space tourism, amongst others. It is beyond the scope of this paper to delve into these mentioned aspects of tourism in detail. That notwithstanding, it is pertinent to note that the medical tourism sector continues to grow at an increasingly fast rate and has emerged as a major force for the growth of services exports, not only in India, but worldwide. Apart from India, countries like the United Kingdom, Middle East, Japan, U.S., Canada, Belgium,

Costa Rica, Cuba, Dubai, Hungary, Israel, Jordan, Malaysia, Singapore, South Africa, Thailand and several others have emerged as active players in the medical tourism business.

India has emerged as major player in global medical tourism and has become the destination of choice for afflicted Nigerians who can afford to, or are compelled by fate of ill-health, to seek medical attention in that country. According to the Indian High Commission in Nigeria, 47 percent of Nigerians that visited India in the year 2012 did so to seek medical attention, while the remaining 53 percent did so for business, training, tourism and as students (Daily Independent Newspaper, June 6, 2014, p.3). The 47 percent of Nigerians that visited India for medical purposes amounted to 18,000 persons out of a total of 38,000 visas issued to Nigerians visiting India in 2012. The Nigerian medical tourists to India expended N41.6 billion (US\$260 million) in foreign exchange in the process (Daily Independent Newspaper, June 6, 2014, p.3). The trend resulted from the inequality in access to healthcare and dearth of specialised medical facilities, which have remained a critical challenge to Nigeria's healthcare provision.

The article examines the growing phenomenon of medical tourism in Nigeria-India relations. It also discusses the evolving relationship between Nigeria and India and the growing presence of Indian investments in the Nigerian medical sector. It is evident that the attraction of Nigerians to Indian hospitals is hinge on the desire to seek quality and cost effective healthcare services. According to Modi (2011, p.125), India is emerging as a global healthcare provider because of its ability to offer world-class expertise at developing world costs. In addition to the public health care facilities maintained by the Indian government and long standing well equipped private healthcare centres, recently, there has been a proliferation of new private healthcare facilities in India. Government support and increased investment in medical infrastructure facilities are some of the factors that have contributed to the growth of the industry in India. Other underlying issues that define the growth medical tourism in India are air connections and access to visa facilities. The paper is divided into seven sections. Following the introduction, the second section examines the concept of medical tourism. The third section focuses on the history, character and dynamics of Nigeria-India relations. The fourth section looks at medical tourism and Nigeria-India cooperation. The challenges in medical tourism in India are discussed in the fifth section. Section six focuses on medical tourism and inflow of Indian investment in the medical sector. Section seven is the conclusion.

## **2. THE CONCEPT OF MEDICAL TOURISM**

Many scholars working on the subject have attempted to define medical tourism. Generally speaking, the term medical tourism is the act of travelling to other countries to obtain medical, dental and surgical care. According to Goodrich and Goodrich (1987), medical tourism is the

attempt to attract tourists by deliberately promoting its health-care services and facilities, in addition to its regular tourist amenities. Laws (1996) defined medical tourism as a travel from home to other destination to improve one's health condition as one type of leisure. This includes getting indigenous and alternative medical services, and any other form of tourism undertaken with the purpose of addressing a health concern. Connell (2006) describes medical tourism as a popular mass culture where people travel to overseas countries to obtain healthcare services and facilities such as medical, dental and surgical care whilst having the opportunity to visit the tourist spots of that country. Carrera and Bridges (2006) have defined medical tourism as travel which is systematically planned to maintain one's physical and mental health condition. According to the General Agreement on Trade and Services (GATS), medical tourism is the second mode of trade in health services. In this mode, customers (patients) leave their home country to obtain health care services with high quality and affordable prices.

Blouin et al., (2006) and Monica (2007) argue that medical tourism occurs when international patients travel across boundaries for their healthcare and medical needs. It can be understood as provision of cost effective private medical care in collaboration with the tourism industry for patients needing surgical and other forms of specialized treatment. Bookman & Bookman (2007) have defined medical tourism as travel with the aim of improving one's health, and also an economic activity that entails trade in services and represents two sectors - medicine and tourism. Dawn & Pal (2011) introduced an interesting dimension to the discourse on medical tourism. According to these authors, medical tourism is looking for available quality combined with cost effective and low price health services while offering a similar level of safety to the patient.

In the past, the majority of medical tourists visited the industrialized countries of the world especially Europe, the UK, Middle East, Japan, U.S. and Canada, where the cost of medical treatment has become very expensive and there are often long waiting times for treatments. Over the years, the increased number of medical tourists including government officials, elites and citizens, who can afford the cost of travel, treatment and accommodation, travel to emerging economies to receive medical care. Medical tourists from the less developed countries, such as Nigeria, travelled to other countries to receive medical care, for other reasons other than just cost. In most cases, the quality of medical care is poor or lacking due to the collapse of medical sector in their countries. For most ordinary citizens, tourism is hardly the attraction, but their main aim is usually to seek medical attention in well equipped hospitals in foreign countries (Olukotun, 2013, p.1). Other than India, emerging countries that are currently promoting medical tourism are Thailand, Malaysia, Singapore, South Korea, Bolivia, Brazil, Belgium, Cuba, Costa Rica, Hungary, and Jordan. Also in context, private sector development in emerging economies, such as India, Thailand, Singapore, and certain Latin American nations, attracts foreign patients for relatively cheaper care: the uninsured, the underinsured, or those who prefer not to wait for treatment under a national health insurance system.



The dynamics of globalization has had its impact on the medical tourism industry. This construct of globalization in relation to medical tourism highlights the importance of the reduction of fees that time and space impose, and should warrant particular attention to the extensive role of the internet. Over one billion individuals have access to the internet, and this number is growing daily. The internet is a truly global forum for information dissemination, advertisement as well as a medical information transport device which has virtually no boundaries. Patients and doctors are able to converse and share information instantaneously; the internet provides a practically free avenue to deliver medical history, X-rays, and other complex tests via email, in addition to video conferencing and free online chatting. The patients' primary care doctor at home can converse with their surgeons abroad at little more cost than the doctors' time.

Within the realm of the health sector, medical tourism is at the forefront of the globalization debate for various reasons. Firstly, most medical tourism sites exist within developing countries with high populations of poor and typically fewer healthcare professionals than demand requires. Secondly, many developing countries send hundreds or thousands of their citizens to the developed world for medical education, and these newly produced medical professionals remain in the developed world to practice. The combination of these two events leaves the developing world wanting more; hence the attraction of medical patients from the less developed countries to relatively more developed countries such as India.

### **3. THE HISTORY, CHARACTER AND DYNAMICS OF NIGERIA-INDIA RELATIONS**

Historical exigencies, particularly, British colonialism brought the two countries into contact, with India becoming independent much earlier than Nigeria in 1947, while Nigeria became independent in 1960. The presence of a sizable number of Indians in Nigeria and Nigerians in India, which stood at about 35,000 and 5000 respectively in 2010, (Sachdev, 2011, p.1), is an attestation of this historical link. The Indian community has strong presence in Nigeria in the areas of trade and manufacturing, especially large departmental stores, textiles manufacturing, pharmaceuticals, paints, chemicals, engineering, banking, manufacturing, brewing, consumer goods and electronics. There are over 100 Indian companies that have established profitable technical and business ventures in Nigeria. These include Chellarams PLC, Bhojsons, Ranbaxy pharmaceutical company, Tata Automobiles, Reliance Communications, Airtel Barti Telecommunications, Bajaj, NIIT, Aptech, Indorama, Godrej, Primus hospital, Dana group, Stallion group, amongst others, which employ thousands of Indians and Nigerians. Their penetration of the Nigerian market has been facilitated by Nigeria's free economy as opposed to India's semi-closed economy.

Nigeria and India are important countries and both occupy strategic positions especially in their respective regions. This is apparently because of the sizes of their population, military, economic

endowments, and roles and contributions in the international system. For instance India accounts for 75 percent of the population of South Asia, 65 percent of its total area and 78 percent of its Gross Domestic Product (GDP) (Singh, 2007, p.25). India with a population of above 1.2 billion people is the second most populous country in the world next only to China (Government of India-Census of India, 2011). Economically, India has a dynamic and highly competitive private sector which accounts for over 75 percent of its GDP. Its GDP was estimated at US\$2.1 trillion in 2014-2015 and its average annual GDP growth rate stood at 6.1 per cent during 2011-2012 (IMF, 2014, p.2).

Nigeria stands out not only in West Africa, but also in Africa. Historically, Nigeria has played prominent roles at sub-regional, continental and global levels. With a population of 140,003,542 million people (National Populations Commission, 2006), Nigeria is not only the most populous nation in Africa and ranking 8<sup>th</sup> in the world, but also has the largest population of black people in the world. Nigeria's annual Gross Domestic Product (GDP) in the year ending December 2013 was estimated at N80.3 trillion (US\$509.9 billion), the highest in Africa, and the 26<sup>th</sup> largest economy in the world (Yemi, 2014, p.8). Nigeria's exports were worth US\$98.364 billion in the fourth quarter of 2013 (Economy Watch, 2013), which was far higher than most countries on the continent. The country produces 1.8-2.3 million barrels of crude oil per day, a major commodity which account for 95 percent of Nigerian export earnings come from oil (Munyama, 2009, p.5), and 65 percent of total government revenue (Aribisala, 2013, p.1). Nigerian oil reserves are estimated at 32-36 billion barrels, and in addition the country is among the most richly endowed in the world in terms of natural gas, with an estimated 100-188 million cubic feet of reserves (Statistical Review of World Energy, 2009). Nigeria is rich in solid minerals, and its land is suitable for agricultural production of a variety of food and cash crops. Nigeria has the largest, best equipped and trained armed forces in the West Africa.

Badejo (1990, p.88) notes that factors such as English language, governmental procedures, anti-colonial struggles as well as contemporary interests, necessarily brought the two countries into contact, interaction and cooperation. Both countries have diversities of religions, cultures, and languages. Both countries played active roles in the Commonwealth of Nations, as well as Group of 77 (G-77), Non-Aligned Movement (NAM), and Group of 15 (G-15). They are also members of the Asian-African Legal Consultative Organisation (AALCO), Afro-Asian Rural Development Organisation (AARDO). Both countries have demonstrated support for anti-colonial and anti-apartheid struggles and have been visible at multilateral platforms such as the United Nations (UN) and the World Trade Organization (WTO) and have actively supported the reform the world body and the demand of a new economic order. Both countries have demanded deeper participation of developing countries concerning critical issues on the global agenda such as climate change, the Doha rounds and the need to curb the spread of terrorism (The Guardian, October 15, 2007).

The relationship between the two countries has been strengthened at the political level through exchange of visits by political leaders. In the first 40 years of Nigeria's independence, there were two official visits from an Indian Prime Minister to Nigeria (Vasudevan, 2010, p.11). The first visit was by India's first Prime Minister Pandit Jawaharlal Nehru in September 1962, while the second was by Prime Minister Manmohan Singh in 2007 from October 14 -17, 2007 during which, the Abuja Declaration on strategic partnership between India and Nigeria and other Memoranda of Understanding were signed. Among the Nigerian leaders that have visited India are: President Shehu Shagari who was guest of honour at India's Republic Day Celebrations in January 1983; Brigadier Tunde Idiagbon and Commodore Augustus Aikhomu, on 2<sup>nd</sup> November, 1984 to attended the burial of former Prime Minister of India, Mrs Indira Gandhi; and President Olusegun Obasanjo who was a guest of honour at India's Republic Day Celebrations in January 2000. During Obasanjo's historic visit, he assured the Indians that Nigeria would soon be Africa's 'most lucrative market'; enabling India to access other West African markets as well (The Hindu Newspaper, 27 January 2000). Similarly, during the third India Africa Forum Summit held from October 23-29, 2015, President Muhammadu Buhari, who was among the 54 African leaders invited to the summit, assured heads of industries in Nigeria and prospective investors in New Delhi, that his administration will fight corruption and create a stable business environment for all businesses in Nigeria.

At the economic level, the two countries had been interacting even before Nigeria's independence in 1960. The Indian company known as Kishinchand-Chellarams (now Chellarams PLC) was established in Nigeria since 1923. Trade between the two countries was estimated to have reached US\$16.3 billion in June, 2015. While exports from India stood at US\$2.68 billion dollars, imports from Nigeria, which comprised mainly crude oil, stood at US\$13.68 billion (Leadership News, June 6, 2015). Indian investment in Nigeria is estimated to be over ten billion dollars (Sachdev, 2014, p.181). It was also reported that India, with an investment of US\$5 billion, was the largest investor in Nigeria in 2010 (The Punch, 12 August, 2011, p.20).

Indian entrepreneurs' presence in the Nigerian economy is well diversified and does not easily subject itself to stratification. However, Indian investment in Nigeria can be compartmentalised into three broad categories on the basis of the source of investments. These include: India-based (Tata and Airtel), by Nigeria-based Indians (Dana Group, Chanrais, and Chellerams) and by third country based Indians (Indorama). The current Indian entrepreneurial presence in Nigeria touches virtually all aspects of the Nigerian economy, even as its relative strengths are uneven. Although many of the Indian ventures are concentrated around Lagos, Indian enterprises are present in many Nigerian states as well. In terms of numbers, the pharmaceutical sector dominates with over 30 establishments, followed by healthcare, steel smelting (from scrap) and consumer products. In terms of size of investments, Airtel Nigeria currently has the highest investments with an estimate of about 4.5 billion US dollars. The major Indian investments in Nigeria comprise of Airtel,

Indorama, various groups of Channai family, Sterling Energy, Dana group, Stallion group, Mehtanis, Chellarams group, Bajaj, Tata, Godrej, NIIT, Ashok Leyland, Skipper, Simba and Primus amongst others.

Another meaningful and enduring relationship between Nigeria and India is in the area of military cooperation which dates back to 1961 (Kura, 2009). Over the years, the Nigerian armed forces have benefited from the various forms of military assistance by the Indian government. Particularly, the Indian government helped in the building of the military institutions, including the Nigerian Defense Academy (NDA) in Kaduna and the Command and Staff College (CSC) Jaji in Kaduna (Isa, 2008:59; Kura, 2009:14). The Indian government has also provided scholarships under the Special Commonwealth African Assistance Plan (SCAAP) (Pham, 2007a:53). The annual number of scholarships to Nigerian students for studies in India has also been increased from 50 to 75. In fact two former Nigerian Heads of State, General Olusegun Obasanjo and Ibrahim Babangida received military training in India. In 1997, 10 out of the 36 Military administrators received military training in India (Isa, 2008:59).

Notwithstanding some commonalities between them such as historical experiences of underdevelopment under British colonialism as well as diversities of religions, cultures, and languages, India's determination to break away from underdevelopment and dependency has led her to emerge as a developed and a destination country for medical tourism. It is within this context that we can understand India's quest for increased engagement of countries with resource endowment and large markets such as Nigeria.

After it introduced an economic liberalization programme in 1991, India's foreign policy shifted from Gandhian and Nehruvian principles and rhetoric of south-south, nonalignment etc to focus on pragmatic economic diplomacy. This shaped its relations with African countries as well. India began to view Africa through a strategic lens and realized that economic engagement with African countries could serve its national interests. Africa's rich energy resources were attractive for a rapidly industrialising India. India has since then used economic diplomacy as a method of engaging African countries, including Nigeria. In 1993, the Indian government stated that, 'in the future, new relationships based on concrete economic, technological, educational cooperation will assume significance' (MEA, Annual Report, 1992-1993, 55). Indian officials also emphasised that the orientation of India's foreign policy is designed to promote 'enlightened national interest' (Beri, 2011, 1). At the same time, Indian policy makers pointed out clearly that energy security is an important element of India's foreign policy, particularly in the context of the developing world. According to the Indian Prime Minister, Manmohan Singh, 'our concern for energy security has become an important element of our diplomacy and is shaping our relations with range of countries across the global, Africa, West Asia, and Latin America' (Beri, 2011, 1).

India has, in recent times, made several efforts to engage Nigeria and other African countries, with an interest motivated by geo-economics, especially in terms of resources. While some have interpreted the phenomenon of India's increased engagement of Nigeria in the light of a new scramble for Africa's resources and markets, others see it as a continuity of a relationship in the light of old ties such as in the days of the Nonaligned Movement, anti-colonial struggle and in the spirit of South-South cooperation. The first was held in New Delhi in April 2008, and the second was held in Addis Ababa in 2011 and the third was held in 2015. The first two summits witnessed a serious strategic push from the Indian government to strengthen its ties with African nations. The cooperation framework adopted at the 2008 Summit outlines the priority areas of future cooperation which ranged from capacity building, agriculture, infrastructure development, health food security, energy security and technology cooperation.

The 2011 Summit sought to enhance partnership between Africa and India for the mutual benefits. Both partners agreed to assist each other to achieve inclusive growth, socio-economic development and self-reliance. Areas for such cooperation outlined included sharing strategies for sustainable development, poverty alleviation, healthcare and universal education, and sharing appropriate technologies. Although several issues were highlighted during these summits, however, the desire to ensure energy security is seen as the dominant interest in India's policy towards Africa today. From October 26 to 29, 2015, India hosted the third India-Africa Forum Summit (IAFS III), which had in attendance representatives of 54 countries, with 40 Heads of State or government. Originally scheduled for December 2014 but postponed because of the Ebola crisis, IAFS III was a spectacular event. African Heads of state as well as representatives from the African Union (AU) and continental bodies like the New Partnership for Africa's Development (NEPAD) agency were in attendance at the meeting in New Delhi.

In lined with the theme of the IAFS III, which is 'Invigorated Partnership: Shared Vision' the Indian government offered additional concessional credit of 10 billion US dollars under concessional lines of credit (LOC) over the next five years. That was double the US\$5 billion announced at the 2011 summit. This is an addition to the ongoing credit programme. It also offered a grant assistance of 600 million US dollars, which includes an India-Africa Development Fund of 100 million US dollars and an India-Africa Health Fund of 10 million US dollars. It also included 50, 000 scholarships in India over the next five years. In addition, India pledged to support the expansion of the Pan African E-Network and institutions of skilling, training and learning across Africa. The problems with the LOCs are well documented including a widening gap between sanctions and disbursements. In a pre-summit media briefing in New Delhi on October 17, Secretary (West) in the Ministry of External Affairs, Navtej singh Sarna, gave an update on LOCs. On the US\$7.4 billion offered before 2015 summit, US\$6.8 was approved and only US\$3.5 billion had been disbursed. In effect most African countries were unable to access the LOCs promised. Both India and recipient African countries are responsible for the low disbursement of the LOCs. In India, a multi-tiered and

multi-agency framework for sanctioning and disbursing these loans creates delays. Additionally, a non-transparent process engenders attendant distortions. Exim Bank, which finally disburses the loans, has complained to the Prime Minister of India's office about malpractices (Singhal, 2015: 3). On the African side, capacity gaps in drawing up detailed project reports essentially for the Indian side to conduct a proper appraisal and assessment caused enormous delays. Nigeria is one of the countries that have not been able to access the US\$100 LOCs promised during the visit of Indian Prime Minister, Manmohan Singh to Nigeria in 2007. The complaint from the Indian side has been lack of transparency and accountability. On the Nigerian side, there have been complains of lack of cooperation from the Indian government. That notwithstanding, during the IAFS III in 2015, the Indian government promised to review the implementation of, and progress, areas of cooperation and identified projects.

There are many dynamic considerations why the Indian government is increasing its engagement of key African countries such as Nigeria. At the forefront of India's foreign policy priorities as from the 1990s is energy security (Obi, 2010, p.187). The Indian economy has grown rapidly from the 1990s, and securing cheap energy and other strategic raw materials as well as markets on a long-term basis has become an economic and political imperative. It is projected that by 2030, India will be the world's third-largest consumer of energy. Currently, 75 percent of India's oil imports come from the politically volatile Middle East. Notably, because India possesses few proven oil reserves, diversifying the sources of its energy supply by developing stronger economic ties with the African continent tops the political agenda. With projections suggesting that India will depend on oil for almost 90 percent of its energy needs by the end of this decade, it is little wonder that energy security through the diversification of supplies is a key priority. Given Africa's position as the last oil frontier, and Nigeria as Africa's largest producer of oil, it is only strategic that India engages the continent, and Nigeria, in particular, in the pursuit of her energy security interests. This urgency is further elevated by the increasing scramble for African resources and markets by India, China and the industrialised countries of Europe and America. Nigeria has also become a major attraction to Indian oil companies in recent years because its oil is of high quality, being low in sulphur.

Secondly, Nigeria, given its huge population and the strategic size of its economy now the largest in Africa, has emerged as an important market for Indian goods and services, as well as tourism industry of which medical tourism is currently a major attraction for Nigerians. In this regard, the Indian private sector, with sufficient government support, has been active in expanding trade and investment in Nigeria to capture its market potential. Indian hospitals either directly or through agents have reached out to Nigerians promising 'first-class treatment at Third World prices'. Similarly, as a developing country, Nigeria is also interested in drawing lessons from the Indian experience, having moved up from an industrially underdeveloped state. It is also interested in drawing lessons from India's experience in the areas of information and communications

technology, agriculture, pharmaceutical and medical sector, as well as small and medium scale enterprises, with its huge potential for employment generation in Nigeria (Ashiru, 2012, p.3).

While acknowledging the fact that India has its own share of development problems including, high rates of poverty, unemployment and corruption, there is no denying the fact that India has moved up the development ladder. India has made achievements in the areas of industrialisation, scientific and technological capabilities, advances in information and communications technology (ICT), as well as medical sector from which Nigeria could benefit immensely. Strengthening relations between the two countries becomes even more imperative since both nations are looking for avenues to promote their interests in an increasingly changing and interdependent global environment.

#### **4. MEDICAL TOURISM AND NIGERIA-INDIA COOPERATION**

The reasons for the increase of Nigerians going for medical tourism in India are many. First, years of systemic decay by a lack of political commitment, corruption and mismanagement of the national economy has also affected the health sector. The political leaders inclusive lack confidence in healthcare facilities established by them and prefer to go abroad for treatment. Aside the lack of confidence in the health sector, the then President of NMA, Dr Osahon Enabulele, argued that the major reason for the medical pilgrimage, includes persistent negligence and under-development of the health sector, especially under the military era; poor funding and out-of-pocket financing of the sector; declining quality of medical personnel occasioned by dwindling standards of education. Secondly, with the Nigerians preference for anything foreign, it is not surprising that over 5,000 citizens fly out on a monthly basis, seeking medical treatment in India and other countries. According to the Nigeria Medical Association (NMA), while Nigeria loses over US\$500 million annually, India gains about US\$260 million of the resultant cash flight. Buoyed by the boom of its medical tourism due ostensibly to Nigerians' patronage, India's projection for the year 2014 was to realize a huge sum of between US\$1bn and US\$2bn from a medical tourism market worth over US\$20bn (Shanmugam, 2013).

At all levels of government, local, state and federal, there are many contributing factors. These factors make subjecting result to treatment in any Nigerian hospital an avoidable risk. The late activist, Gani Fawehinmi was diagnosed in Nigeria of Malaria was treated of same several times, only to discover that it was cancer, when he travelled for treatment abroad (The Punch, June 26th, 2014). Unfortunately the right diagnosis was made too late to save him. The same fates that befall several Nigerians go unreported in the country. The irony is that most of those Nigerians who can afford to spend between US\$20,000 and US\$50,000 on an average trip abroad for medical

treatment may end up being treated by fellow Nigerians, who back home, would not have been as efficient and prominent as they have become in a foreign land.

The main reasons for the growing popularity of medical tourism in India include the long waiting lists in the developed countries; low cost of medical treatments in India as compared to other developed countries. Table 1 provides Cost Comparison between India, USA, Thailand, and Singapore US dollars.

Table 1: Cost Comparison between India, USA, Thailand, and Singapore (approximate figures in US\$)

Procedure	US	India	Thailand	Singapore
Heart bypass	1,30,000	10,000	11,000	18,500
Heart valve replacement	1,60,000	9,000	10,000	12,500
Angioplasty	57,000	11,000	13,000	13,000
Hip replacement	43,000	9,000	12,000	12,000
Hysterectomy	20,000	3,000	4,000	6,000
Knee replacement	40,000	8,500	10,000	13,000
Spinal fusion	62,000	5,500	7,000	9,000

International Figures Based on Hospital Quotes in Named Countries

Source: <http://www.docstoc.com/docs/12163631/MEDICAL-TOURISM/P/36>

From the table above, there is no doubt that India provides relatively cheaper fees compared to the USA, Thailand, and Singapore. Apart from cheaper cost, the attraction to India has been facilitated by increased use of the internet to communicate with prospective hospitals and increase in air travels. With the development of information and communications technologies (ICT), new



tourism companies have emerged that act as middlemen between international patients and hospital networks, giving patients easy access to information, prices and options. Other reasons for the increased popularity of medical tourism in India are the state-of-art technology, specialist doctors, nurses and para-medical staffs that have been adopted by the big hospitals and diagnostics centres in India. In India, the medical education system also caters to the ever increasing demand for the delivery of the quality health care services all over the country (Suthin et al., 2007).

Table 2: Trends in the Performance Indicators in the Indian Tourism Industry

Year	Foreign Tourist Arrivals (in Million)	Foreign Exchange Earnings from Tourism					Visits to States and Union Territories		Out Bound Tourism (Million)
		India (Rs. crore)	World (US\$ Billion)	India (US\$ Billion)	India's Share (%)	India's Rank	Domestic (in Million)	Foreign (in Million)	
1991	1.68	4318	276.9	1.9	0.67	-	66.67	3.15	1.94
1992	1.87	5951	315.4	2.1	0.67	-	81.46	3.10	2.16
1993	1.76	6611	321.9	2.1	0.66	-	105.81	3.54	2.73
1994	1.89	7129	354.9	2.3	0.64	-	127.12	4.03	2.73
1995	2.12	8430	405.3	2.6	0.64	-	136.64	4.64	3.06
1996	2.29	10046	438.7	2.8	0.65	-	140.12	5.03	3.46
1997	2.37	10511	442.8	2.9	0.65	-	159.88	5.50	3.73
1998	2.36	12150	444.8	2.9	0.66	34th	168.20	5.54	3.81
1999	2.48	12951	458.2	3.0	0.66	35th	190.67	5.83	4.11
2000	2.65	15626	475.3	3.5	0.73	36th	220.11	5.89	4.42
2001	2.54	15083	463.8	3.2	0.69	36th	236.47	5.44	4.56
2002	2.38	15064	481.9	3.1	0.64	37th	269.60	5.16	4.94
2003	2.73	20729	529.3	4.5	0.84	37th	309.04	6.71	5.35
2004	3.46	27944	633.2	6.2	0.97	26th	366.27	8.36	6.21
2005	3.92	33123	679.6	7.5	1.10	22nd	392.01	9.95	7.18
2006	4.45	39025	744.0	8.6	1.16	22nd	462.32	11.74	8.34
2007	5.08	44360	857.0	10.7	1.25	22nd	526.56	13.26	9.78
2008	5.28	51294	939.0	11.8	1.26	22nd	563.03	14.38	10.87
2009	5.17	54960	851.0	11.4	1.34	22nd	668.80	14.37	11.07
2010	5.78	64889	919.0	14.2	1.54	17th	747.70	17.91	12.99
2011	6.29	77591	n.a	16.6	n.a	n.a	850.86	19.95	n.a.
Average Annual Growth Rates (%)									
1992-2002	4.35	14.64	5.68	8.24	-	-	13.87	6.98	8.99
2003-2011	11.63	20.32	8.71*	21.23	-	-	13.70	16.56	12.97*

Source: Government of India (2011); \* till 2010.

With the growth of medical tourism in India, the tourism industry in the country as a whole which has witnessed significant growth since the 1990s has also emerged as a major income earner for India. Table 2 captures the growth of the tourism industry in India from 1991 to 2011.

Foreign tourist arrivals to India increased from 1.68 million people in 1991 to 6.29 million people in 2011. India's earning from tourism also increased from US\$ 1.9 million to US\$ 16.6 million within the same period, with India also ranking as the 17<sup>th</sup> highest earner in world in tourism in 2010. According to the Confederation of Indian Industry (CII), the industry's earning potential of medical tourism sector was estimated at Rs.5000-10000 Cores by 2012 (CII-Mckinsey, 2002, p.2). The major service providers in Indian medical tourism include: the Apollo Hospitals, Escorts Hospital, Fortis Hospitals, Breach Candy, Hinduja, Mumbai's Asian Heart Institute, Arvind Eye Hospitals, Manipal Hospitals, Mallya Hospital, Shankara Nethralaya and AIIMs, a public sector hospital. In terms of locations, New Delhi, Chennai, Bangalore and Mumbai cater to the maximum number of health tourists and are fast emerging as medical tourism hubs. It also visualizes high-end healthcare services through Indian BPO firms like Hinduja TMT, Apollo Heart Street, Comat Technologies, Datamatics and Lapiz that work in the areas of claim adjudication, billing and coding, transcriptions and form processing. One-stop centres in key international markets to facilitate patient flow and stream lining immigration for healthcare are envisaged. The CII, along with Indian Health Care Federation (IHCF), wants to establish an Indian healthcare brand synonymous with safety, trust and excellence. Therefore, it is clear that the opportunities and challenges for growth in the health sector are seen primarily within the private/corporate sector, not in the public sector. Nowadays medical tourism in India includes advanced and life savings health care services like open transplants, cardiovascular surgery, eye treatment, knee/hip different cosmetic surgeries and alternate systems of medicine. Also leisure aspect medical travelling/wellness tourism may be included on such medical travel trips. India provides a variety of medical services to overseas patients. The reality, however, is that 'medical tourisms' are hardly tourisms in the true sense. For instance there is nothing tourism about chemotherapy, heart surgery, kidney transplant and other related treatment of cronic diseases. Medical tourism in India is not without challenges.

## 5. THE CHALLENGES IN MEDICAL TOURISM IN INDIA

There are several challenges involved in medical tourism in India. Like many developing countries, though better off than many, some parts of India suffers from lack of adequate infrastructural facilities including poor power supply, poor water supply, lack of connectivity, and lack of coordinating system (Dawn and Pal, 2011, p.193). Major challenges that impact on medical tourism sector in India include poor accessibility, lack of, or insufficient capital, lack of community participation and awareness, lack of concern for sustainability, complex visa procedures, lack of good language translators, accommodation challenges and poor airport facilities to carter for patients who arrive with critical conditions. Most Indian hospitals are also face problems such lack of trust from the foreign patients. Some Nigerians, whose patients or family members have either suffered complications after being treated or died in Indian hospitals, have complained of the medical treatment in India and observed that the medical treatment in India falls below their expectations (The Punch Newspaper, April 21, 2014). The Indians on the other hand have blamed

Nigerians of bringing patients to India only when they are in critical conditions and often too late to save them. The Indians have also pointed out that some Nigerians visiting the country for medical treatment lack medical insurance to cover medical bills and some lack adequate resources to cater for their stay including payment of accommodation or hotels (The Punch Newspaper, April 21, 2014). Some Indian hospitals have been criticised for observing poor hygiene, especially among the medical attendants; unhygienic food handling; and lack of proper hospitality services; heterogeneous pricing of services and no industry standards (Dawn and Pal, 2011, p.193).

A strong case has also been made on the need for the Indian government to be more involved in medical tourism in India, rather than leaving it in the hands of the private sector that are currently more involved in the medical tourism business. Problems facing medical tourism industry in India, which are perceived as caused by the government include- poor regulations, taxation anomalies, bureaucratic bottlenecks, lack of land reforms, lack of long-term investor friendly policies and instability with respect to terrorism and communal tensions (Dawn and Pal, 2011, p.193). On the part of insurance and allied services, the medical tourism industry in India is also facing some serious bottlenecks. These include inadequate insurance cover, underdeveloped insurance market in India, insurance frauds and overseas companies refusing reimbursement to customers (patients). Apart from these, there are some specific issues that have to do with quality of personnel. They include quality accreditations to the Indian hospitals and service providers, training and development to the Doctors, Nurses and Para medical staffs, lack of customer oriented approach.

There is no doubt that medical tourism to India involves high costs and many other challenges encountered on the part of afflicted Nigerians travelling to access medical care in India. These issues are further exacerbated by the lack of direct air travels between Nigeria and India. Travellers to India have to connect flights in Addis Ababa, South Africa, Dubai, Nairobi, Cairo, Doha, Frankfurt or London. Movements of patients during emergencies have proved to be very uncomfortable and also difficult on account of lack of direct flights between the two countries. Processing visa for medical purposes to India involves complex procedures of uploading personal data through an online system, printing and submission, and in most cases, appearing in person for interview, documents and medical report citing and biometric capturing. These procedures, no doubt are cumbersome for patients seeking medical attention in India. As part of the new National Tourism Policy (Government of India, 2002), the Eleventh Five Year Plan (Planning Commission, 2008), the Indian government took various steps to promote tourism in India. One of the major steps was the introduction of Visa-on Arrival scheme was introduced for tourists from Singapore, Finland, New Zealand, Luxembourg, and Japan on a pilot basis from January 2010 and was extended to many other nations in 2011 (Shanmugam, 2013, p.10). So far, the Visa-on Arrival scheme has not been extended to medical tourists from Nigeria. Given the large number of Nigerians visiting India for medical tourism, the government of India should consider extending the Visa-on Arrival scheme to

Nigerians visiting India for medical purpose. This should be done, in addition to reducing the difficulties faced by patients and accompanying relatives in processing visa from Nigeria for medical purposes in India. The Indian government, in turn, stands to benefit as indicated in the Draft Approach to the 12<sup>th</sup> Five Year (Planning Commission, 2011) reports which highlighted the importance of the tourism sector in terms of its contribution to GDP and employment generation. Against this backdrop, medical tourism has provided a new platform for partnership between Nigeria and India in the provision of state of the art medical care by Indian professionals locally through the establishment of Indian managed hospitals in Nigeria.

## **6. MEDICAL TOURISM AND INFLOW OF INDIAN INVESTMENTS IN THE NIGERIAN MEDICAL SECTOR**

Recently, Nigeria witnessed the entry of Indian hospitals, a development, which the Nigerian government under President Goodluck Ebele Jonathan had argued will curb medical tourism and reduce capital flight to India. The Chennai-based Apollo Group of Hospitals, with an extensive network of hospitals in India and abroad, was the first private hospital group to offer its consultancy services to hospitals in West Africa, in Ghana and Nigeria in 2003/2004. In 2004, Apollo partnered with Hygeia Nigeria, which owns the largest Health Maintenance Organization (HMO), with over two hundred hospitals and clinics in the country (Modi, 2010, p.128). Since 2000, Apollo has been the largest provider of telemedicine in India. In Nigeria, Apollo, which is located at Wuse II in Abuja, has assisted in capacity-building through upgrading the skills of medical personnel and has introduced state-of-the-art techniques that are used by the Apollo chain of hospitals in India ([www.apollohospitals.com](http://www.apollohospitals.com)). It has also worked to improve the clinical and administrative process and also train doctors in super specialty disciplines and provide telemedicine support. Another leading Indian hospital in Nigeria is Primus hospital located at Karu in Abuja. The hospital, which began with capacity of 120 beds, before expanding to 250 beds in 2012, conducts major surgeries in Nigeria. The hospital also has state of the art advanced technology.

Evidently buoyed by the huge returns on investments, the Indian High Commissioner to Nigeria noted that Indian investors have expressed readiness to establish Indian hospitals across the six geopolitical zones of the country. This was followed by the entry of Vedic Lifecare Clinic in 2013 (<http://www.vediclifecare.com/home.html>). The hospital which was established at a cost of N20 billion, is supported by clinical, technological and management support from Manipal Hospitals based in India. Manipal Hospitals is one of the most patronized hospitals by Nigerians on medical tourism to India and is part of the Manipal Educational and Medical Group (MEMG), which pioneers in the field of education and healthcare delivery in India. The setting up of the Indian hospital in Nigeria is therefore to be accessible to more Nigerians that would have hitherto

travelled to India for treatment. The hospital, located at Lekki, Lagos, offers multi-specialty tertiary healthcare and seeks to expand the concept to Abuja, Port Harcourt and Warri.

There is no doubt that particularly, the public health infrastructure in Nigeria, is in shambles owing mainly to poor funding, shortage of medical facilities and personnel and poor medical service delivery. These inadequacies have created immense opportunities for the Indian medical sector's marketing line of 'first-class treatment at Third World prices'. Having the medical facilities closer to home is undoubtedly advantageous, particularly, in terms of immediate access to medical facilities and regular follow-ups. To overcome the shortage of healthcare facilities, the Nigerian government explored the possibility of Indian investments in hospitals and export of medical skills in the form of public-private-partnerships (PPP) in the country. There is no doubt that this arrangement, whether in form of medical tourism or the incursion of Indian hospitals, gives India an edge and offers huge gains from the Nigerian economy. So far, the entry of a few Indian investments in the medical sector has not curbed the outflow of medical tourists to India. The complex interdependent nature of Nigeria's relations with India in the medical sector is such that both countries cannot just walk away from the relations. While India depends on the Nigerian market for medical tourists or customers (patients) for the Indian hospitals, Nigeria on the other hand depends on Indian expertise in the health sector and has to pay the huge cost of health services offered by the Indian hospitals.

## **7. CONCLUSION**

Promoted by the Indian government, the medical sector and tourism industries, India is increasingly seen as the favoured destination of 'medical tourists' from developing countries such as Nigeria, who seek better treatment at relatively cheaper cost than is obtained in the developed countries. Thus, both the public and private hospitals in India are experiencing an influx of patients from Nigeria, who can afford to pay the bills or are compelled by fate of ill health to travel to India for treatment. The key selling points of the Indian medical tourism industry to Nigerians and other patients from developing countries are the combination of high quality facilities, competent, English-speaking medical professionals, cost effectiveness and the attractions of tourism. As noted earlier, the term medical tourism has been subjected to various interpretations. For some, there is nothing to suggest leisure or tourism about chemotherapy, heart surgery, kidney transplant and other related treatment of chronic diseases. Rather, it is the long wait and poor attention often given, lack of professionals/specialists in these areas, and also, lack of specialised medical facilities in Nigerian hospitals that have compelled some people to travel to India to seek medical care. There is a need to improve the quality of healthcare delivery in the country; restore the confidence of citizens in the health sector, and, more importantly, create the enabling environment for the Nigerian medical practitioners in the diaspora to return home and also boost Nigeria's medical

tourism. An improved health sector will, no doubt, reduce the huge cash flight which the current exodus to India for medical treatment represents and go a long way to boost the ailing economy. The conclusion of this article is that medical tourism provides a basis for partnership between Nigeria and India. In this regard, the paper recommends that the Indian example could be replicated in Nigeria by encouraging Nigerian and Indian entrepreneurs to partner and invest massively in the provision of quality, affordable and accessible healthcare services in Nigeria.

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# *THE ESTIMATION OF PHYSICAL AND REAL CARRYING CAPACITY WITH APPLICATION ON EGYPT'S TOURIST SITES*

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## **ABSTRACT**

The concept of carrying capacity arose as an effective tool to avoid many negative impacts that occur as a result of excessive visitor numbers. This paper aims at outlining the importance of carrying capacity application and estimating it for two of the main tourist sites in Egypt including the Egyptian Museum and Saint Katherine Protected Area, as a starting point to initiate its application on other tourist sites in Egypt.

The results indicated that the tourists visiting Saint Katherine Protected Area are less than its potentials, whereas the actual numbers of tourists visiting the Egyptian Museum are higher than the estimated values of its physical and real carrying capacity.

**Keywords:** Carrying capacity estimation, physical and real carrying capacity, Egypt's tourist sites, the Egyptian Museum, Saint Katherine Protected Area.

## 1 INTRODUCTION

Since tourism is dependent upon non-renewable resources and tourism flows are constantly growing, the rapid, as well as, the unplanned exploitation and utilization of these resources create the risk of their degradation and the probability of environmental hazards increases. Hence sustainable approaches need to be employed (Rajan et al., 2013). The aim of sustainable tourism development is the long-term and optimal use of tourism resources without causing negative impacts on the natural, social and economic environments (Jurincic, 2005). In terms of developing sustainable tourism, the concept of carrying capacity arose with the intention to avoid the saturation levels that both put natural and cultural systems at danger. It has received considerable attention and is often considered one of most effective ways to protect the destination physically, socially, culturally and ecologically by establishing the upper limits of visitor numbers allowed to enter a tourist site (Rajan et al., 2013), especially that each tourist destination has a limited capacity to attract tourists, as well as, the related activities. Nevertheless, despite the growing concern for developing and utilizing tools that could facilitate planners and decision-makers in their efforts to control tourism development, there is limited experience not only in implementing tourism carrying capacity but also in measuring it (Coccossis and Mexa 2004).

Managing and redefining tourism development in the existing tourist destinations in Egypt is a key element in this research, which provides an attempt of estimating the tourism carrying capacity for tourist sites in Egypt. The major contribution of this research is to provide two examples of how the theoretical concept of carrying capacity can be practically applied and can serve the management of natural and historical sites in future planning. In addition, the results were compared with the actual tourists' numbers visiting both sites during the period from (2010-2013). This is the original finding of the current research that is not found in previous studies.

To meet these objectives, the following research questions were developed:

- 1- What is the maximum number of people that should be allowed to enter Saint Catherine Protected Area and the Egyptian Museum?
- 2- Has the carrying capacity of both sites been exceeded or is it still within its range?

## 2 LITERATURE REVIEW

### 2.1. Carrying capacity background, forms and definition

The term carrying capacity derives from wildlife ecology, as it was used to define the maximal population size of a certain species that an area can support without reducing its ability to maintain the same species in the future. It arose from the perception that tourism cannot grow forever in a place without causing irreversible damage to the local system (Coccossis and Mexa, 2004). Since the 1970s, carrying capacity has been further developed as a precise technique and as a method of numerical calculation for determining land-use limits and development control for managing tourism in sensitive natural and cultural environments (Clark, 1996). Afterwards, a variety of more sophisticated planning and management frameworks have been developed, using qualitative methodologies. These frameworks set standards or ranges of acceptable change and describe a methodology for determining these standards, measuring impacts and identifying management strategies or controlling negative impacts. They include Limits of Acceptable Change (LAC), Visitor Impact Management (VIM), Visitor Experience Resource Protection (VERP), Management Process for Visitor Activities (VAMP), Recreation Opportunity Spectrum (ROS), Tourism Optimization Management Model (TOMM). While each framework has a unique origin, they share common features and could be considered as different aspects of a specific monitoring and management strategy, i.e. making tourism sustainable in balance with other economic activities in the long-term. However, tourism carrying capacity remains an integral part of the management frameworks of most natural and cultural areas (Kostopoulou and Kyritsis, 2006).

The increased flow of either local or foreign tourists beyond the carrying capacity of any natural or cultural area may deteriorate its quality and destroy it. One way to deal with this problem is to identify the carrying capacity of the different areas and any tourism beyond the acceptable carrying capacity should be strictly prohibited (Rajan et al., 2013).

In 1994, the World Tourism Organization (WTO) proposed a definition of tourism carrying capacity as follows: "*The maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic, socio-cultural environment and an unacceptable decrease in the quality of visitors' satisfaction*" (Nghie et al., 2007, pp. 80, 81). In addition, Hens (1998) defined the tourism carrying capacity as the maximum number of people that use a tourist site without causing negative effects on environmental resources while meeting the demands of tourists.

Moreover, Munar (2002) outlined that the carrying capacity provides the optimum level upon which resources can deteriorate or damage, by using a mathematical formula that determines the adequate tourists' numbers, and according to McNeely and Thorsell (1987) carrying capacity is the

maximum level of visitor use that an area can accommodate with high levels of visitors' satisfaction and few negative impacts on resources.

## **2.2. The various forms of carrying capacity**

According to Kostopoulou and Kyritsis (2006); Lagmoj et al. (2012) and Kurhade (2013) and Rajan et al. (2013), there are a number of different forms of carrying capacity referred to in tourism; however this paper will focus on the most commonly used:

*The physical carrying capacity* is the maximum number that a tourist attraction is able to support. This carrying capacity is often used as a managerial tool that defines a threshold beyond which environmental changes, disturbance and problems occur.

*The economic carrying capacity* relates to a level of unacceptable change within the local economy of a tourist destination. It is the extent to which a tourist destination is able to accommodate tourist functions without the loss of local activities.

*The social carrying capacity* concerns the negative socio-cultural effects related to tourism development. It defines the amount of effects resulting from tourists on the host societies, as well as, the density tolerance rate of tourists.

*The biophysical carrying capacity* deals with the extent to which the natural environment is able to tolerate interference from tourists. In other words, it is the limit where the damage exceeds the habitat's ability to regenerate.

*The environmental carrying capacity* refers to ecological and physical parameters, capacity of resources, ecosystems and infrastructure.

*The psychological (conceptual) carrying capacity* refers to the maximum number of visitors for whom an area is able to provide a quality experience at any one time (Ceballos-Lascuráin, 1996).

*The tourism carrying capacity* is a specific type of environmental carrying capacity and refers to the (biophysical and social) environment with respect to tourist activity and development (Wolters, 1991).

### 2.3. Carrying capacity importance and estimation

Carrying capacity is a complex and variable concept in the field of tourism due to its multiple dimensions that have different thresholds and implications for tourism development (Kostopoulou and Kyritsis, 2006), even though it has significant contribution to sustainable tourism growth (Ceballos-Luscaráin, 1996). Experiences have shown that tourism carrying capacity has proved to be an efficient planning tool applicable in both less developed and highly developed areas (Academia, 2015).

Furthermore, Mexa and Coccossis (2004) indicated that despite several criticisms, carrying capacity assessment remains a powerful concept that can be used for planning and management of sustainable tourism. Besides, it is helpful in policy formation, planning of infrastructural facilities, natural resource allocation etc., as it permits managers of an area or tourist attraction to make decisions about the maximum intensity of visitation to be allowed in a given interval of time.

Additionally, Segrado et al. (2008) reported that apart from outlining all factors that limit tourism growth, the concept of carrying capacity also indicates compensatory tools to manage tourism flows to a destination. Mondal (2012) agrees with Ceballos-Luscaráin's viewpoint by arguing that while there are different kinds of adverse factors that reduce the carrying capacity of any destination, its assessment remains one of the most effective tools to detect the degree of negative impacts and intensity of use in tourist sites. Nevertheless, it is difficult to quantify the accurate carrying capacity value, since it is dynamic in nature in terms of space and time.

That's why, it is commonly recognized that there are no fixed or standard tourism carrying capacity values. Rather, carrying capacity varies, depending upon place, season and time, user behavior, facility design, patterns and levels of management, and the dynamic character of the environments themselves. In addition, it is not always possible in practice to separate the tourist activity from other human activities. However, tourism planning can benefit from attempts to define tourism carrying capacity for a specific site or sites since these will offer an indication of the limits and limitations to tourism development (Ceballos-Luscaráin, 1996).

There are various techniques available for the assessment of carrying capacity, the most and widely used one is the method proposed by Cifuentes's (1992), which was further explained and applied by several other authors including Ceballos-Luscaráin, (1996); Munar (2002); Nghi et al. (2007); Segrado et al. (2008); Zacarias et al. (2011) and Lagmoj et al. (2013). This framework attempts to establish the maximum number of tourists that an area can tolerate, based on its physical, biological and management conditions of the area. This is accomplished by determining the site specific factors, representing the limitations of the area, which reduce the level and quality of visitation, by considering three main levels:

The physical carrying capacity (PCC): is the maximum number of visitors who can attend physically in a given place and time, To apply this method, it is important to consider tourist flows, the size of the area, the optimum space available for each tourist to move freely and the visiting time (Cifuentes, 1992).

The real carrying capacity (RCC): is the maximum permissible number of visits to a specific site, which is calculated according to the limiting factors resulting from specific conditions of that place and influence of these factors on the physical carrying capacity. It is worth noting that these limiting or corrective factors are not necessarily the same for each site; and only the negative factors which hinder or affect tourism activities are considered, among which the environmental factors are usually the most important. These factors are then translated into quantitative values (Nghie et al., 2007).

The effective or permissible carrying capacity (ECC): is the maximum number of visits that a site can sustain considering the RCC and the management capacity (Nghie et al., 2007; Zacarias et al., 2011; Lagmoj et al., 2013).

Each subsequent level constitutes a corrected or reduced level of the previous one, i.e. PCC is always greater than RCC and RCC is greater or equal to ECC.

The PCC can be expressed according to following formula:

$$PCC = A \times V/a \times Rf$$

Where: A = available area for public use

V/a = area required per user

Rf = Open period / Average time of one visit

The RCC is determined by the following equation

$$RCC = PCC \times 100 - Cf_1 / 100 \times 100 - Cf_2 / 100 \times \dots 100 - Cf_n / 100, \text{ where}$$

$$Cf = (M_1 / M_t) \times 100$$

Cf<sub>1</sub>- Cf<sub>n</sub> are the corrective factors, they are expressed as a percentage

M<sub>1</sub> = limiting magnitude of variable

M<sub>t</sub> = total magnitude of variable

$ECC = RCC \times MC$ , where: MC = management capacity. Measuring MC is not easy, as it involves many variables, including policy measures, legislation, infrastructure, facilities, amenities and equipment, staff (both number and competency), funding, available budget, etc. (Cifuentes, 1992; Ceballos-Lascuráin, 1996). Therefore, this is beyond the research focus.

### 3 METHODOLOGY

This research is quantitative, applied research. It relied on the most widely framework proposed by Cifuentes's (1992), which was further explained, adapted and applied on the different tourist sites in the various countries, such as beaches (Zacarias et al., 2011; Rajan et al., 2013); eco-sensitive areas or protected areas (Kostopoulou and Kyritsis, 2006; Sayan and Ortaçesme, 2006; Kurhade, 2013); forests (Lagmoj et al., 2013); museums (Mondal, 2012); caves (Nghi et al., 2007) and lagoons (Fadaee et al. 2013). Therefore, the research adopted this methodology for the estimation of the physical and real carrying capacity of Saint Katherine Protected Area and the Egyptian Museum.

This paper focused on Saint Katherine Protected Area and the Egyptian Museum, as study areas. Saint Katherine is acknowledged as World Cultural and Natural Heritage Site and is one of the largest and most important protected areas in Egypt. It is of unique history and includes enormous religious and culturally significant sites, as well as, the country's highest mountains that support a surprising biodiversity and endemic species (Mallarah, 2008; Ministry of Environment, 2015). As regards the Egyptian Museum, it is the largest and the most famous museum in Egypt.

The researcher attempted to estimate the maximum number of tourists that should be allowed to visit both sites without endangering the surrounding ecological, social and cultural environments. As an initial attempt and the difficulty to obtain information in Egypt, the related data for this particular purpose was not available. Therefore, the estimation included only the physical and real carrying capacity for both sites and excluded the effective carrying capacity due to the complexity of its calculation.

The researcher depended mainly on secondary data including various published and unpublished reports, case studies, as well as, assessment methods conducted by different nations, in addition to field visits and interviews held with the managers and tour guides of Saint Catherine Protected Area and the Egyptian Museum and questionnaires distributed among 300 tourists in the Museum. Furthermore, because studies on the area required per user are not available for both sites, the value of  $1m^2$  was adopted from (Ceballos-Lascuráin, 1996; Mowforth and Munt, 2003; Sayan and Ortaçesme, 2006; Nghi et al., 2007; Sayan and Atik, 2011; Mondal, 2012).



## 4 STUDY AREAS

### 4.1. Saint Katherine Protected Area (Protectorate)

*Description.* In 1988, St. Katherine area was declared as a Nature Protectorate, under Law 102/1983, by Prime Minister's Decree no. 613. It occupies much of the central part of South Sinai with an area of about 4300km<sup>2</sup>. The Protectorate is a complex system of mountains and valleys at the meeting of Wadi Asbaaiya with Wadi El-Arbain. Furthermore, it includes oases around water springs and wells that are unique attractions worldwide.

Besides, the area is characterized by the highest mountain tops in Egypt, among which the Monastery of St. Katherine and Mount Sinai are only two of its numerous outstanding cultural and religious heritage sites. Saint Katherine Monastery, founded in the 6th century, is said to be the only well-kept and intact Byzantine building from that period, in the world. It is the highest peak in Egypt (2,624 m above sea-level) and houses exceptional collections of early Christian manuscripts and icons.

In addition, the mountain setting is one of the country's biodiversity hotspots, supporting a diverse and unique assembly of flora, representing almost 40% of Egypt's total flora, many of which are rare, endangered and locally used as medicinal plants. Moreover, the Protected Area is equally rich in fauna, with several species not found elsewhere in Egypt or the world. All this richness has granted Saint Katherine Protected Area a particular importance as a cultural heritage site of international value which was the basis of a flourishing tourist industry in the past 20 years. Additionally, Bedouin communities living within the Protectorate pursue their traditional ways of life while participating in and benefiting from tourism, as community guards, manufacturers of handicrafts, guides and other ecotourism activities.

*Climate.* Saint Katherine area has an arid climate and rainfall is irregular. It lies within the Saharan-Mediterranean climate type and is considered the coolest area in Egypt. It has pleasant spring and summer, while the winter season is very cold and the nights could reach -14 °C. In addition, snowfalls in Saint Katherine take place regularly in the winter months (December, January and February) (National Egyptian UNESCO Commission, 2000; Nature Conservation Sector, 2006).

*Tourism.* Considering the tourist's flow to Saint Katherine Protected Area during the last four years (2010-2013), the number of tourists ranged in average between 320000 tourists and 350000 tourists yearly, in normal times, excluding the times of unrest (unpublished official data, Saint Katherine Protected Area).

## 4.2. The Egyptian Museum

*Description.* The Egyptian Museum in Cairo contains the world's most extensive collection of pharaonic antiquities. To prevent the plundering of archaeological sites by local and foreign treasure hunters, as well as, by consuls representing foreign countries and their agents, the Egyptian government collected and situated the Egyptian antiquities for the first time in a small building in the Azbakiah garden in Cairo. In 1858, another museum was established in Bulaq by Auguste Mariette. Later he built a great museum after the flooding of the first Bulaq museum in 1878, when many objects were washed away in 1890. The contents of the Bulaq museum were transferred to an annex of the Giza Palace of Ismail Pasha where they remained until the present museum was opened in 1902 at Tahrir Square (El- Shahawy and Atiya, 2010).

Designed in the Neoclassical style by the French architect Marcel Dourgnon, the Egyptian Museum hosts 107 halls, filled with artifacts dating from the prehistoric through the Roman periods. The museum houses approximately 160,000 objects including mummies, sarcophagi, pottery, jewelry and King Tutankhamen's treasures (the boy-king's death-mask discovered in its tomb is made of solid gold and it has been described as the most beautiful object ever made), covering 5,000 years of Egypt's past (Supreme Council of Antiques, 2011; Egypt Tourism Authority, 2014).

*Interior design.* The collections found on the ground floor, including an extensive collection of papyrus and coins used in the ancient world, are organized chronologically. On the papyrus, several languages can be observed including Greek, Latin, Arabic, and ancient Egyptian. Besides, on the ground floor, there are artifacts from the New Kingdom, the time period between 1550 and 1069 BC. These artifacts are generally larger than the items created in earlier centuries. Those items include statues, tables, and coffins etc. On the first floor, there are artifacts, grouped according to tomb or category, from the final two dynasties of Egypt, including items from the tombs of the Pharaohs Thutmose III, Thutmose IV, Amenophis II and Hatshepsut. On the second floor there are also many of the New Kingdom royal mummies (Supreme Council of Antiques, 2011; Egypt Tourism Authority, 2014).

*Tourism.* According to the data obtained from the Egyptian Museum, in 2010 42895537 tourists entered the museum. In 2011, the number of tourists fell dramatically to reach 12604891 tourists due to the Egyptian Revolution. Then the numbers increased to 17211417 and 22512320 in 2012 and 2013, respectively, after the political conditions in Egypt have improved. These numbers are depicted by (Table 1).

Table 1 Numbers of Tourists

Year	No. of Tourists
2010	42895537
2011	12604891
2012	17211417
2013	22512320

Source: The Egyptian Museum (unpublished data).

## 5 RESULTS

### 5.1. Carrying capacity estimation for Saint Katherine Protected Area

*Physical carrying capacity.*  $PCC = A \times V/a \times Rf$

The available area for visitor use is 2950 km<sup>2</sup> (=2950000 m<sup>2</sup>) (unpublished official data, Saint Katherine Protected Area).

Area required per user = 1 m<sup>2</sup>

Open period of the Protected Area= 24 hours (Saint Katherine park office).

Average time of one visit= 10 hours (pers. communication with the manager and tour guides of the protected area).

Rotation factor: Open period / Average time of one visit = 24 hours/10 hours = 2.4, this means theoretically, a person could make 2.4 visits in one day.

Thus,  $PCC = 2950000 \times 1 \times 2.4 = 7080000$  tourists per day

$7080000 \times 365 = 2584200000$  tourists per year.

*Real carrying capacity.*  $RCC = PCC \times 100 - Cf_1/100 \times 100 - Cf_2/100 \times \dots 100 - Cf_n/100$

The interview held with the manager and tour guides in Saint Katherine protected area revealed that the climatic conditions are mainly the limiting factors in the area, of which excessive sunshine and snowfall were identified as the most important. The days of excessive sunshine and snowfall

were calculated after the investigation of Saint Katherine weather according to Cedar Lake Ventures, Inc (2014) and Weather2Travel (2014).

#### Excessive sun shine

At Saint Katherine, approximately for 4 hours sunshine is intense all over the year, making visits to the site very uncomfortable. During the winter season, which lasts for three months, intense sunshine is reduced to 2 hours.

Hence, 273 sunny days per year (9 months) x 4 excessive sunshine hours per day=1092 hours of excessive sunshine per year.

92 sunny days (3 months of winter) x 2 excessive sunshine hours per day = 184 hours of excessive sunshine per year

Total hours of excessive sun shine per year:

$1092 + 184 = 1276$  total hours of excessive shine per year

The total number of sunshine hours per month is displayed by (Table 2).

Table 2 Total Number of Sunshine Hours/Month

Jan	Feb	March	April	May	June	July	Aug	Sp	Oct	Nov	Dec
8	9	9	9	10	12	12	12	11	10	9	8

Source: Weather2Travel (2014)

The total hours of available sunshine =

62 days (2 months) x 8 hours = 496 hours/year

119 days (4 months) x 9 hours =1071hours/year

92 days (3 months) x 12 hours =1104 hours/year

62 days (2 months) x 10 hours =620 hours/year

30 days (one month) x 11 hours =330 hours/year

Consequently, total hours of sunshine per year= 496+1071+1104+620+330= 3621

Thus,  $CF_3 = 1276 \text{ hours of excessive sunshine per year} / 3621 \text{ total hours of sunshine per year} \times 100 = 35.24\%$

#### Snowfall

As snowfall in Saint Katherine occurs during the months of December, January and February (=90 days) then

$90/365 = 24.658\%$

Thus,  $RCC = 7080000 \times 0.6476 \times 0.753 = 3452511 \text{ visitors per day}$  and  $3452511 \times 365 = 1260166515 \text{ visitors per year}$ .

## 5.2. Carrying capacity estimation for the Egyptian Museum

*Physical carrying capacity.*  $PCC = A \times V/a \times Rf$

The available area for visitor use is  $13600 \text{ m}^2$  (unpublished data, the Egyptian Museum)

Area required per user =  $1 \text{ m}^2$

Open period of the Egyptian Museum = 7 hours (Egypt Tourism Authority, 2014)

Average time of one visit = 3 hours (pers. communication with the manager and tour guides of the Egyptian Museum).

Rotation factor:  $\text{Open period} / \text{Average time of one visit} = 7 \text{ hours} / 3 \text{ hours} = 2.3$ , this means that theoretically, a person could make 2.3 visits in one day.

Thus,  $PCC = 13600 \times 1 \times 2.3 = 31280 \text{ visitors per day}$ , and  $31280 \times 365 = 11417200 \text{ visitors per year}$ .

*Real carrying capacity.* To investigate the main factors that adversely affect the tourist visit in the Egyptian Museum, the researcher consulted the manager and some tour guides of the Egyptian Museum and three factors were mostly identified including:  $CF_1$ = the overcrowding during the tour,  $CF_2$ = the unpleasant display of many objects and  $CF_3$ = the uncomfortable condition of ventilation. The tourists were asked to express their opinions concerning these arguments according to three point Likert-scale ranging from agree (1), neither agree or disagree (2) and disagree (3). 300 questionnaires were distributed among the tourists during the months of January and May 2013. The results are depicted by (Table 3).

Table 3 Tourists' Opinions Concerning the Limiting Factors for the Egyptian Museum (January and May 2013)

Respondents' opinions	Limiting Factors		
	CF <sub>1</sub>	CF <sub>2</sub>	CF <sub>3</sub>
Agree	150	133	190
Neither agree or disagree	20	45	10
Disagree	130	122	100

$$RCC = PCC \times 100 - Cf_1 / 100 \times 100 - Cf_2 / 100 \times \dots 100 - Cf_n / 100$$

$$\text{Where } Cf = (M_1 / M_t) \times 100$$

$$Cf = \text{No. of people who agree with those arguments} / \text{Total people surveyed} \times 100$$

The results revealed that the maximum number of tourists who agreed with the first argument were 150 tourists,

$$\text{Thus, } Cf_1 = 150 / 300 \times 100 = 50\%$$

The maximum no. of tourists who agreed with the second argument were 133 tourists,

$$\text{Thus, } Cf_2 = 133 / 300 \times 100 = 44\%$$

The maximum no. of tourists who agreed with the second argument were 190 tourists,

$$\text{Thus, } Cf_3 = 190 / 300 \times 100 = 63\%$$

$$RCC = 31280 \times 0.5 \times 0.56 \times 0.37 = 3241 \text{ per day} \times 365 = 1182822 \text{ per year}$$

## 6 DISCUSSION, CONCLUSION AND IMPLICATIONS

The purpose of this research paper was to outline the theory and practice of tourism carrying capacity assessment and its significance as a management tool for the tourist sites in Egypt, as well as, to highlight the need to redefine tourism development and management in the existing sites on a more sustainable basis. To realize this objective the research provided a practical attempt for estimating the tourism capacity for two important tourist sites in Egypt (Saint Katherine Protected

Area and the Egyptian Museum), as a starting point to initiate its application on the other sites Egypt to ensure their protection in the future.

The physical and real carrying capacity for both sites was calculated depending on the formulas proposed by Cifuentes (1992). Two corrective factors related to the climate conditions of Saint Katherine were determined including snowfall and excessive sunshine. The physical carry capacity was calculated at 7080000 tourists per day and 2584200000 tourists per year, meaning that the maximum number of people who are allowed to enter the protected area should never exceed this range. Regarding the real carrying capacity, it was calculated at 3452511 tourists per day and 1260166515 tourists per year. By observing the average numbers of tourists who entered Saint Katherine during the last four years (2010-2013), it is obvious that they are below the physical and real carrying capacity values estimated in this research. This may be due the large area of the Protected Area, which attracts a special segment of tourists, who aim adventure and mountains' climbing. Thus, the actual tourists' numbers are suitable for the site and it is still room for increasing the numbers within the protected area's capacity. These results agree with the results of Sayan and Ortaçesme (2006) and Fadaee et al. (2013).

With reference to the physical carrying capacity of the Egyptian Museum, it was estimated at 31280 tourists per day and 11417200 tourists per year. This means that the museum could not physically sustain more than these numbers. After considering three corrective factors in the Egyptian Museum including the overcrowding of tourists, the unpleasant display of many objects and the uncomfortable conditions of aeration inside the museum, the real carrying capacity was estimated at 3241 per day and 1182822 tourists per year, meaning that the number of tourists who are allowed to enter the museum should not exceed these values. However, the carrying capacity values don't depict the optimal or effective number of tourists which was not calculated in this research.

At the same time, it is worth highlighting that this situation will be changed after the opening of the Grand Egyptian Museum (GEM), the museum for the third millennium. It is situated about three kilometers from the Giza pyramids and described as the largest archaeological museum in the world. The GEM will link the immemorial past with the future and all stored artifacts in the Egyptian Museum will be redistributed between the two museums, about 3500 of which belong to the famous King Tutankhamen. The Grand Egyptian Museum complex is extremely flexible and suitable for permanent and temporary exhibitions with an attendance up to 15,000 visitors per day. It contains a library, a research center, restoration laboratories, a museum for children and one for people with disabilities, a public square with shops and an open air museum and parking facilities. The construction of the new museum was a very suitable and wise solution to the problems that face the tourists in the Egyptian Museum (The Grand Egyptian Museum, 2015). This suggests that proper plans and regulations should be properly taken by the management of Egypt's

tourist sites to keep tourism development, as well as, the tourists' numbers within the carrying capacity limit.

## **7 LIMITATIONS AND FURTHER RESEARCH**

This research estimated the physical and real carrying capacity for Saint Catherine Protected Area and the Egyptian Museum. Therefore, it is suggested that further research should focus on estimating the effective carrying capacity for both sites, as an indication of the optimal number of tourists, which was a limitation in the present research. Furthermore, it is recommended to apply the concept of carrying capacity on the other natural and historical sites in Egypt to prevent the damage that can be caused by the excessive numbers of visitors. In addition, it should be recognized that the carrying capacity value estimated for any site is not fixed, as it develops with time, as well as, tourism growth and can be affected by management and planning techniques and controls. Therefore, it should be constantly assessed and monitored.

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# EXPLORING THE VIEWS OF THE STAKEHOLDERS OF THE PREFECTURE OF MESSINIA ON THE IMPACT OF CURRENT CRISIS ON LOCAL AND REGIONAL TOURISM AND THE ACTS NEEDED TO OVERCOME IT

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## Introduction

Sustainable tourism development in certain areas requires the collaboration of all the various parties involved, including state, regional and local officials, local communities, local and regional unions, clubs and organizations and the private sector<sup>1</sup>. All these parties, along with national and international bodies, tourist operators, tourism associations, residents of the region and (wherever applicable) organized tourists, are the *tourism stakeholders*, as defined by the World Tourism Organization and other researchers<sup>2</sup>. Stakeholders can contribute to tourism development by offering their expertise and resources in a collaboration that must not be circumstantial, but part of a developmental plan: indeed, if the role of each participant is not clear from the beginning, increased complexity in decision making may occur<sup>3</sup>. It is therefore apparent that the views of the stakeholders of a destination are extremely important, especially in crisis situations as the present ones.

## Aim

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<sup>1</sup> Borges, 2011.

<sup>2</sup> WTO, 1994; Gartner, 1996; Williams, 1998.

<sup>3</sup> Borges, 2011.

The aim of the present study was to record

the understanding of the stakeholders of the prefecture of Messinia on the impact of current crisis on local and regional tourism

acts taken to meet current crisis and estimated results

future acts needed to overcome current crisis.

## **Material and method**

To meet the aims of this study we used a questionnaire that was distributed to 10 primary active stakeholders of the prefecture of Messinia, of which 8 (rate 80.0%) responded. They were the Port Authority of Messinia, the Kalamata Marina Authority, the Association of Travel Agencies of Messinia, the Hotel Owners Association of Messinia, the Hotel Owners Association of Trifyllia, the Tourism Organization of the Region of Peloponnese, the Culture and Tourism Development Office of the Municipality of Kalamata and the Messinian Chamber of Commerce. The research was quantitative and, despite the small number of participants, their nature as primary stakeholders of the area was thought to be able to provide both an accurate view of the current situation and also adequate proposals for future acts.

For the statistical analysis we used the SPSS 20.0 statistical package that offers predictive tools which help analytical research<sup>4</sup>. Descriptive statistics were also used for the analysis of the questionnaires.

## **Results**

On answering the first line of questions (what is their view on the reduction in turnover of tourism enterprises in the prefecture of Messinia), 37.5% of the participants stated that it was true, 12.5% opposed and 50% did not answer due to lack of data. The estimated mean percentage of reduction was 50%. Interestingly, only 12.5% of participants stated that the tourism industry income was reduced, estimating it around 25%; again, 62.5% of all responders stated that their answer was not accurate, as there is no official data to support their claim. The same was true for staff reduction (estimated to be around 50%) and business close down (50%), while there is

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<sup>4</sup> Pallant, 2007.

absolutely no knowledge as for business relocation. All these answers reflect the poor tourism data recording system of the area.

The second line of questions was on acts and measures taken to overcome current crisis. It is interesting that 6 stakeholders stated that they actually *did* try to do something on their own: indeed, one participated in various exhibitions, another send memos to state officials on various financial problems affecting the local and regional tourism industry, two did not state the exact nature of their action, a fifth participated in marketing actions along with other state officials and the sixth (the Kalamata Port Authority) reduced costs, allowed debt settlements and reconstructed parts of the sea front of the area. Two were not pleased while four stated that they were very pleased by the results of their actions: all stakeholders however requested a closer collaboration with local governors and state officials to improve outcome.

Participants were also asked about their collaboration with regional authorities and other stakeholders: apart from any mandatory collaboration with the regional and state supervisory authority (for instance, the Kalamata Port Authority with the Maritime Ministry), there were only poor efforts to collaborate with other parties, as shown in Table 1. The results were not promising.

Table 1. Collaborating parties and results.

Collaborating parties	Result*
The Culture and Tourism Development Office of the Municipality of Kalamata with various Culture associations and clubs and the Tourism Organization of the Region of Peloponnese	Modest
The Kalamata Marina Authority with nearby Municipalities, Marinas and Port Authorities	Modest
The Hotel Owners Association of Messinia with various developmental organizations, various Municipalities and the Region of Peloponnese	Modest
The Kalamata Port Authority with the tourism development office of the Municipality of Kalamata,	Modest
The Tourism Organization of the Region of Peloponnese with various stakeholders within the area of Peloponnese	Modest
The Hotel Owners Association of Trifyllia with the Municipality of Trifyllia and the Region of Peloponnese	Good
The Messinia Chamber of Commerce with the Region of Peloponnese	Good

\*recorded as good, modest or poor.

The most disappointing finding, however, when answering the following question (on their collaboration with the ministry of tourism and how they grade it), was that only one out of the five stakeholders who collaborated with the Hellenic ministry of tourism was very pleased. This is annoying, as the ministry of tourism is the heart, mind and pocket of tourism development in Greece. Also, as only one stakeholder stated the exact nature of this collaboration (culture festivals under the auspices of the ministry), one has to assume that their collaboration is probably restricted to the implementation of instructions and suggestions made by the Hellenic Tourism Organization or the central government

The third question was on acts and measures not yet taken at a local, regional and national level, but definitely needed to overcome current crisis. Three stakeholders (37.5%) stated that a better coordination between local, regional and state authorities is needed, while another three (37.5%) stated that infrastructure improvement, the development of local marketing plans and some form of collaboration of all active participants in tourism development (apparently on an agreed strategic plan) is needed; two however (25%) did not answer this important question.

On answering the fourth line of questions (on the main local tourism advantages to overcome current crisis), two (25%) think that the natural environment is the main factor, while four (50%) think that the existing infrastructure can do the job if advertised through a proper marketing plan. Again, two stakeholders (25%) did not answer. The examples given in the questionnaire were cultural heritage, natural environment, easy access, venues, cost of life and friendly locals, while participants could also include a personal answer.

The fifth line of questions was on which level (local, regional or national) the current crisis should be addressed. Two stakeholders think that the most appropriate level is the local, two the regional and two the national one, while two did not answer. This was not a surprise, as each stakeholder is affected by its nature: for instance, the Region of Peloponnese thinks that the level should be national, while the Hotel Owners' local associations think that most problems could be resolved locally. However, when asked who should have the responsibility of tourism strategy planning, three (37.5%) stated that it should be the local authorities, four (50%) think that it should be done at a higher level (region or state) while one did not answer.

Finally, participants were asked to give their suggestions on how the current economic crisis should be tackled. Their answers are presented and discussed below.

## Discussion

In today's globalised era, a destination should not only try to retain, but also to further expand its impact on tourism industry in order to meet competition. For tourism destination development the current national and regional strategic tourism plan should be constantly updated in order to provide certain advantages to the destination. According to the basic statement of the World

Establishing the overall tourism development objectives and policies and how can these aims be achieved.

Developing tourism so that its natural and cultural resources are maintained and conserved for future and present use.

Integrating tourism into the overall regional and national development policies, and establishing linkages between tourism and other economic sectors.

Providing a rational basis for decision-making by both the public and private sectors on tourism development.

Enhancing the coordinated development of all the elements of the tourism sector: tourist attractions, activities, facilities and services.

Optimizing and balancing the economic, environmental and social benefits of tourism.

Providing a physical structure which specifies the location, types and extent of tourism development of attractions, facilities, services and infrastructure.

Establishing the guidelines and standards for preparing plans for specific destinations and types of tourism and for the appropriate design of tourist facilities.

Providing the framework for effective coordination of the public and private sector investments.

Providing a baseline for the continuous monitoring of tourism development plans and projects.

Table 2. Advantages of national and regional tourism planning

Tourism Organization<sup>5</sup>, the advantages of national and regional tourism planning are:

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<sup>5</sup> WTO, 1994.



It is also well known that, since the 1990s, public policy makers established new priorities for tourism development planning<sup>6</sup> which are:

The natural environment should always come first.

All proposed strategies should be able to transform tourism into a competitive and dynamic sector.

Distribution channels should be enhanced.

Tourism development policies, usually made by public organizations, should allow and encourage the development of a dynamic private sector.

It is apparent that there is no universal tourism development plan, as each destination needs to be studied and evaluated independently. The planning process, however, must include certain acts<sup>7</sup> such as:

a complete evaluation of the current status, both within and outside the destination,

knowledge and understanding of future trends,

the use of effective and innovative communication tools,

the best available governance of local and regional tourism,

the involvement and participation of stakeholders in the process,

the collaboration of the private sector, local authorities and all other bodies related to planning for sustainable tourism.

Tourism includes various complementary fields, such as transportation, accommodation, entertainment, infrastructure, commerce, even agriculture<sup>8</sup>. Therefore the development of tourism is influenced not only by the elaboration of specific strategies, but also by the integration of state and regional policies definitely needed for sustainable development. These strategy and action plans must aim both fields, the existing tourism status and the future development of alternative forms of tourism: they should also provide local and regional authorities with efficient tools and funding to materialize these plans and encourage the collaboration between state and

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<sup>6</sup> Poon,1993.

<sup>7</sup> Borges, 2011.

<sup>8</sup> Dragos, 2012.

private stakeholders<sup>9</sup>, as it has been proven that the private sector is the main bearer of tourism development<sup>10</sup>. If such collaboration establishes, then actions can be better coordinated; for instance, once an ecotourism development is decided in a certain area, the state must present an act on land use for the private sector to build farm houses and other facilities according to plan. If there are no land use acts, then no ecotourism development plan can exist. The same is true if structural funds (for maintenance of country roads, for instance) are not available to local and regional authorities.

Thus, it is not clear if all stakeholders have the same level of interest in sustainable tourism development<sup>11</sup>; moreover, certain stakeholders are more important than others in determining successful sustainable tourism development<sup>12</sup> while knowledge and skills (proving their superiority) are thought to be the key factors for their implementation<sup>13</sup>. It is not easy, however, to identify if these stakeholders are entitled to represent the local community<sup>14</sup>.

Unfortunately, local authorities and stakeholders in Messinia do not seem to adopt the views discussed above. Firstly, from this study it is apparent that many of them cannot be regarded as primary stakeholders, while their interest is also questionable. From their answers we can also see that there was neither any wide-range collaboration (between stakeholders and the state and also between the various parties of the tourism industry of the area), nor the will to do so. We think that they either failed to understand the urgency of the current situation, or they were disappointed by their collaboration with tourism authorities, especially the ministry of tourism. Things are slightly better regarding their relationship with the Region of Peloponnese, possibly reflecting a better local understanding. One however would expect stakeholders to desperately seek cooperation with all interested parties (in order to minimize the effects of the current crisis) and not to adopt a passive attitude: Table 1 unfortunately does not show any urgency or understanding, as most stakeholders of the prefecture of Messinia limit their relations within the narrow borders of the area. We also think that the results of these interactions are not promising for three main reasons: a. these stakeholders never had any wide

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<sup>9</sup> Aas. 2005.

<sup>10</sup> Dragos, 2012..

<sup>11</sup> Dabphet, 2012; Ladkin, 2002; Hall, 2000; Roberts 1999.

<sup>12</sup> Cooper, 2006.

<sup>13</sup> Dabphet, 2012.

<sup>14</sup> Aas, 2005.

collaboration experience in the past (and they didn't feel the need to do so, despite statements made), b. there is no clear strategic plan involving all parties (that could persuade them on the necessity of working together) and c. all current collaborations were materialized on a voluntary, interpersonal or circumstantial basis that cannot provide adequate results.

There were also no clear or innovative suggestions on acts that should be taken to overcome crisis. Most suggestions were common or vague, reflecting a limited understanding on the matter: however, better coordination between local, regional and state authorities (not clarifying on what basis), infrastructure improvement (not clearly specified or justified) and the development of a local (unspecified) marketing plan (thus, not suggested as part of a wider plan) do not confront the implications of the current crisis. Specific suggestions, made by the tourism office of the Region of Peloponnese, the Messinia Chamber of Commerce and the Hotel Owners Association of the Prefecture of Messinia, were:

Investment facilitations.

More active implementation of the private sector.

Creation of a regional Support Fund<sup>15</sup> to support small and medium sized tourism enterprises.

Various financial solutions on liquidity, loan liabilities' setting and tax facilitations, which could help the local and regional tourism industry.

The development of specific alternative forms of tourism, using the unique local natural resources and the rich culture, history and local heritage of the region (world heritage monuments of UNESCO, remarkable buildings, archaeological sites, historical monuments and traditional settlements).

The formulation and promotion of integrated tourism packages that exploit the comparative advantages of the region and satisfy tourist needs (such as sea excursions, visiting nature landscapes and traditional villages, observing cultural events and festivals -such as the Epidauros festival and the kalamata international dance festival- and participating to sporting and other events, both at sea or on the mountains).

The expansion of tourist demand through partnerships with traditional industries and local activities (wine and oil «roads», local branded products, catering services and local gastronomy) and the collaboration between the various parties of the local and regional tourism industry, to attract tourists interest.

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<sup>15</sup> European Commission, 2012.

While the formulation of a national tourism strategy, as well as a central marketing plan, remains a responsibility of the national tourism organization of Greece, the supplementary role of the peripherally operating stakeholders of tourism seems to be extremely important, according to the presented world literature: apart from being the steam engine of tourism development, they could help adopting a local and regional strategy that avoids overlapping and mismanagement of useable resources and probably execute local marketing plans. The development of (uniformly operating) regional Convention and Visitors Bureaus might be very helpful in recording and analyzing the various tourism parameters of the area<sup>16</sup>, since it is apparent from our research that, at present, there are no reliable data for developing an efficient tourism development strategy. Also, by bringing different (occasionally opposite) opinions to the discussion table, stakeholders definitely contribute to optimum decision making. Overall, principal stakeholders could help the strategies of the various destinations to adopt a comprehensive and complementary targeting, being part of a broader strategy for local and regional tourism development.

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<sup>16</sup> Papageorgiou, 2007.

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# *THE BASIC EMPLOYEE MOTIVATION THEORIES AND THE THEORY OF INTEREST*

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## **Abstract**

Motivation is a process that mobilizes a human to achieve a goal related to the satisfaction of one's needs. Motivation in a working place is the means to increase the quantity and quality of labor. There are a few theories of motivation which will be presented through this paper. The theory of interest is a contemporary theory that will also be analyzed in the present paper.

**Key words:** Motivation, interest, labor, reward.

## **Introduction**

The employee motivation aims to the understanding of their needs, the way they think and react and not to control the employees' will.

The motivation can be simply presented through figure 1 which indicates how the needs act as behavior motives towards specific targets. Those targets' satisfaction leads to the behaviors repetition for further need's satisfaction.

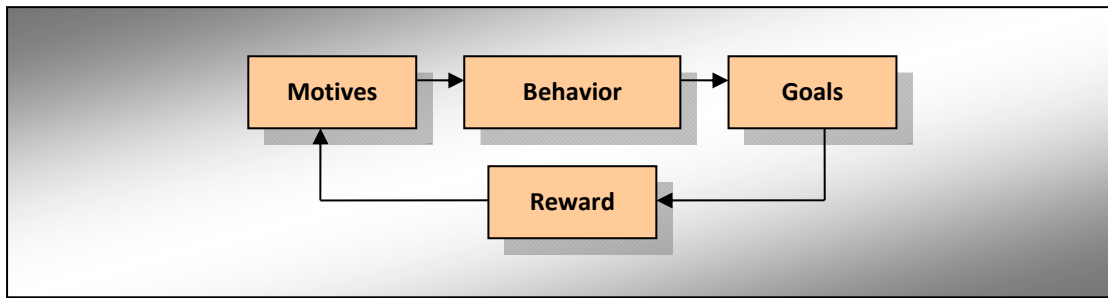


Figure 1. Operation of motivation

The reward gained for achieving a goal operates as a motive for a repeated behavior when needing to achieve that goal again. Several theories attempt to describe the motivation mechanism in order to increase the employees' performance. Most of them search the way that an employee's need satisfaction will maximize their efforts./ The following are the most important theories:

#### **Abraham Maslow: The theory of needs' hierarchy**

There are theories<sup>17</sup> regarding the human needs and their role in behavior. One of the most successful was developed by Abraham Maslow (1943).

Maslow did not agree that human behavior is driven by a series of independent urges. He tried to discern continuity and congestion in the human behavior so he developed a theory which scrutinizes the human needs. Maslow declares that:

Humans are motivated by their needs as they are perceived.

Needs should not be examined individually.

The hindrance of a need at any level leads that level as a major one.

Needs are graded<sup>18</sup> in the following order:

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<sup>17</sup> According to McDougall's book «*Introduction in Social Psychology*», 1908 (σελ 172-181), the human behavior is dominated by instincts such as curiosity, tendency to leave, independence etc.

Freud in his book «*Civilization a source of unhappiness*» notes (p.19) that happiness is the satisfaction of human urges, or else needs that live in the sub conscious.

*Physical needs:* needs for food, water, shelter, sex.

*Safety needs:* needs for safety and constancy.

*Love and belonging needs:* needs for love, belonging, friendship.

*Esteem needs:* needs for recognition, social status, self esteem and self respect.

*Self actualization:* needs for self development, success and progress.

The physical needs are the prime human needs. As soon as the physical needs are satisfied the human turns to the next grade. Since a grade's needs are satisfied they are not a motive anymore and the interest is set to the next grade.

This is normal since the human first tends to find the basics for survival such as air, food, water and shelter. Since these needs are satisfied the human tends to secure this satisfaction in the future (safety needs). Having secured the basics in the reasonable future the human turns to the love needs to ensure his socialization since humans are social beings. Being a member of a society can only lead to the search for esteem, respect and power that are described in the fourth grade of needs. After a human has enough goods, feels safe, lives in harmony in an environment where he is respected, he can then turn to improve himself, create the perfect him and cover the self actualization needs.

Maslow's theory leads to a specific thinking regarding how to use the needs as a motivation. The satisfaction of needs is the actual motive so developing a specific need, creates a motive for the desired satisfaction.

### **Frederick Herzberg: The two factor motivation theory**

Frederick Herzberg in 1959 conducted a research on two hundred employees in Pittsburg, with two questions referring to critical incidents that made them happy and incidents that made them sad in their work<sup>19</sup>. The findings' analysis indicated three conclusions:

1. The employees were dissatisfied, when the following factors were poor:

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<sup>18</sup> Η The schematic presentation of that theory is made with Maslow's pyramid. ("Οργάνωση και Διοίκηση» του Ζάβλανου Μ. Εκδ. Ίων, Αθήνα 1990», σελ 17-21) For more information see Maslow's "Motivation and Personality" Harper & Row N.Y. 1970, where the enterprise discovers the employees' needs and via their satisfaction gains better performance.

<sup>19</sup> Herzberg F. Mausner B. And Snyderman B. "The Motivation to Work" 2nd Edition, N.Y. John Wiley 1959



- Wages
- Security
- Working conditions
- Social status
- The company's policy
- Supervision quality
- Regulations
- Working relations

Herzberg indicated that those factors should be fully covered in order to keep an employee and improve his performance. Those factors are not motives to improve the working outcome but they are important in maintaining a healthy working environment which increases the labor's fruitfulness.

On the other hand some other factors satisfy the employees and they are related to the employee and his work. These factors are:

- Happiness
- Recognition of the performance
- Achievements on the job
- Allocation of responsibilities
- Promotion
- Feeling important

Those factors are named «motivational» since according to Herzberg they function as motives for the increase of the employees' performance.

### **Victor Vroom: The theory of expectation**

According to Vroom<sup>20</sup> η the power of motivation depends on:

The degree of the employees' belief that their increased effort will lead to increased performance,

The degree of the increase of the performance will lead to increase in the reward and

The degree of those employees' desire these rewards.

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<sup>20</sup> Vroom V.H. *“Work and Motivation”* N.Y. John Wiley and Sons Inc. 1964

The employees try to offer higher quality and quantity of labor according to their expectation these efforts will lead to higher productivity, recognition from the enterprise and equivalent rewards

Based on that thinking Vroom developed a function to estimate the motivational power according to which:

$$M = F_i (E \times R)$$

Όπου  $Y$  = Motivation

$\Pi$  = Expectation

$A$  = Rewared

Vroom determines the reward as internal ones (feeling of success, development, actualization) and the external such as wages, benefits and promotion.

Each reward has its meaning for each employee and can be positive if there is offered a benefit or negative if it is to avoid a loss. Positive reward is a productivity bonus and negative is the avoidance of a penalty for late arrival. The positive reward improves the working conditions and the negative one prevents a loss maintaining the original reward state. As Vroom indicates the reward can be layered on levels, which lead from the first to the next etc. The first level reward such as a promotion can lead to the second level such as improved social status and then lead to a third level such as improved family relations.

In order to improve the performance the employees should work in a state of balance. Thus the enterprenual goals should match the social ideas and the operation should serve the enterprenual goals.

### **Stacy Adams: theory of equity**

Stacy Adams indicated that the employees have a strong feeling of justice and they tend to treat their work positively when they are equitable, though they tend to treat their work negatively when they are inequitable. That is why they compare their performance and rewards with those of their colleagues.

As performance is noted the quantity and quality of the offered labor and the comparison can be made among colleagues of the same position (eg. waiters), or different positions and same level (eg. the manager and the executive chef). As a reward is noted anything provided by the company

such as wages, bonus, parking, meals on duty, accommodation, mobile phone, car, status, promotion, and the social recognition.

According to Adams, the employees estimate the level of their performance (P) and the reward (R) forming an index of equity (IE), where:

$$IE = \frac{P}{R}$$

The next step is a comparison among one's self index (s) with the colleagues' index (c). There are three possible outcomes:

$IE_s = IE_c$

$IE_s > IE_c$

$IE_s < IE_c$

In the case where  $IE_s = IE_c$ , and the self index is equivalent with the colleagues index the employee feels equitable to his colleagues and feels being managed fairly so he does not mobilize himself to change the performance.

In case  $IE_s \neq IE_c$  the employee feels he is treated unfairly so he mobilizes to achieve equity.

In the case where  $IE_s > IE_c$ , the employee's index is lower than the colleagues' index and the employee feels anxious and insecure and tries to improve those feelings by increasing his efforts for performance or changing his perception about that situation.

In the case where  $IE_c < IE_s$ , the employee's index is higher than the colleagues' index and the employee feels inequitable. There are two possible reactions, either to decrease his efforts and performance or claim higher rewards. In case that none of these are fruitful the employee will change his internal balance and his perception of his work. If the inequity is strong the employee may increase the absences or even leave.

According to the theory of equity the employees do compare their rewards with the rewards of their colleagues. Thus the enterprise should track the employees' performance and adopt a just reward system.

## **B. Skinner: The reinforcement theory**

Skinner refers to «reinforcement» meaning the impact that follows a specific behavior. The reinforcement can be positive when the impact is positive or negative when the impact is negative.

As Skinner indicated the negative and positive impact of each behavior can lead the employees to repeat or avoid that behavior. That means:

A positively reinforced behavior (with positive impact), leads the employee to repeat it

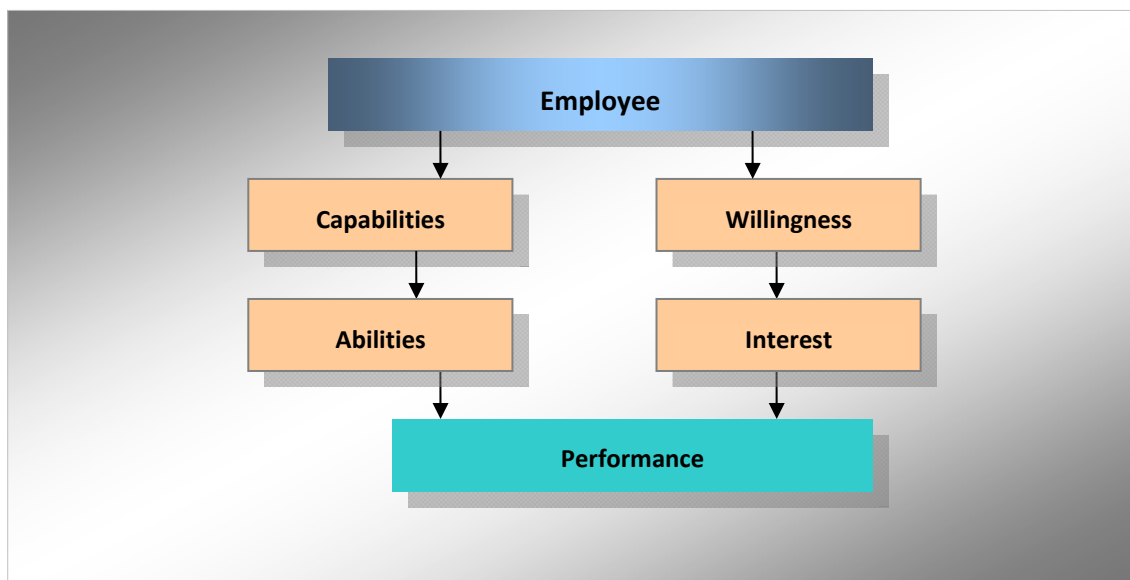
A negatively reinforced behavior leads the employee to avoid it

Gradually, the employee learns to repeat or avoid specific behaviors according to the previous reinforcement. That leads to the conclusion that the employee's behavior is dependant to the management's confrontation.

The positive reinforcement is adjusted to rewards. There are regular rewards that are given at regular intervals or non regular rewards. The non regular rewards have the stronger motivating power..

### **The theory of interest**

The employee can offer his labor efforts in several levels of quality and quantity. The degree of his performance is based on two factors. What the employee is able and what he is willing to offer. In other words the factors are the employee's abilities and interest about his work.



*Figure 2. Basic factors that impact upon the employee's performance*

The employee's capabilities are determined by his physical, mental and spiritual characteristics. A person inputting all of those characteristics, enthusiasm and devotion can display a remarkable performance. In this case the employee confronts the enterprise as his own and acts accordingly in any given situation. This employee, suggests concepts, takes initiatives, executes a task in the best

possible way, he is kind, voluntary and positive towards the customers, cooperative with his colleagues and does his best to improve the operational efficiency.

The employee's capabilities should cover three fields:

Technical capabilities and knowledge related to their profession.

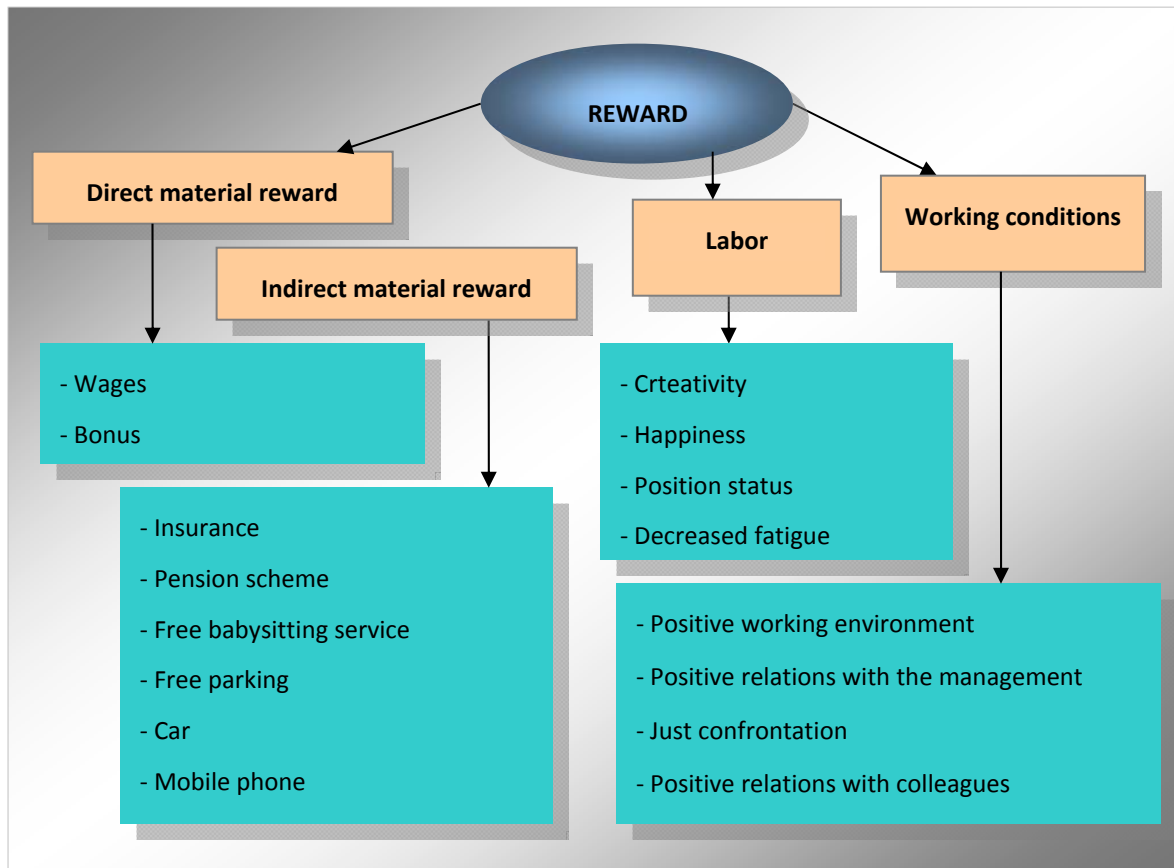


Figure 3. The wider meaning of reward

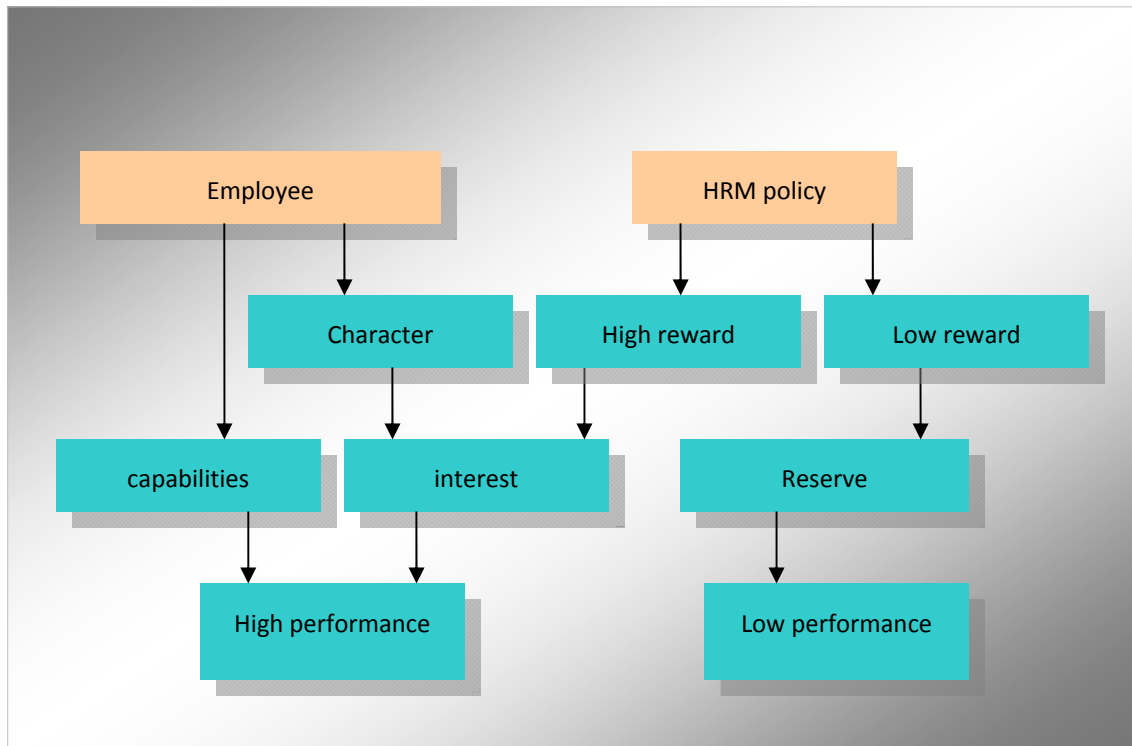
Human capabilities related to communicating with humans.

Mental capabilities, such as swift perspective, organizing manners and combining details. The employees should be able to view their work as a total and overcome any problems before they are noted by an external person.

The employee's interest is related to the expected reward. The benefit may be an avoidance of damage. Being employed in a position of interest is a benefit as much as not being fired from a position of interest. The reward may be material or non material.

As material rewards are the ones offered in money or any other material benefit. The direct material rewards are the wages earned, bonuses and paid holidays. Indirect material rewards are insurance benefits, a mobile phone or a car.

The non material reward is any reason for which the employee feels satisfied for his effort or any reason that does not cause damage. The non material reward refers to the way the company affords the employee or even the working conditions.



*Figure 4 Basic factors affecting the labor efficiency*

The material reward plays a key role in the sum of the employee's quid pro quo. The employee tends to lose faith in the management if the reward is solely non material. In this case the company recognizes the employee's efforts, hence the employee is dissatisfied. The employee receives the message that his effort has produced profits for the company and thus he should get a payrise.

Each employee reacts in a specific way. Their character, personality and financial status determine their reaction to a reward system. For instance an employee may be interested in a mobile phone granted by the company but another person may not. The first person will demonstrate some interest in his work though the second will demonstrate disregard

The HRM policy will determine the total of the material and non material reward in an enterprise. This reward system can play a significant role in the labor efficiency as can be seen on figure 4.

Since the enterprise attempts to achieve high performance from the employees, there will be a number of problems that are related to the employees' professional experiences. The employees tend to be reluctant till negative towards the managerial intentions and it takes time for them to be convinced. It is often that employees try to receive the highest reward for the minimum of effort. Some cases the employees perceive that the company is dependent on them and that is shown through a scheme of high rewards. Thus the reward system should be tightly fastened to the employees' performance.

## **Conclusions**

Fundamental motive to the human behavior is the interest, which is presented as a constant and positive mood for specific activities. The interest's analysis can reveal when the interest is externalized the cognitive, emotional and volitional functions participate in that process . The interest is found where there is a potential benefit.

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# *HOTEL DESIGN: A PATH FOR QUALITATIVE TOURISM*

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## **ABSTRACT**

Greece, like many other countries in the past, was only interested in promoting tourism but lacked the equivalent interest in its quality. However, the era of “sea and sun” is now behind us. New trends and prospects of development are now focusing on the quality and alternative tourism rather than mass tourism. This development emerged in the international landscape, after the sociopolitical, environmental and economic changes that have occurred and continue to occur in recent years.

The transition from mass tourism to quality tourism is proven and necessary if tourism is to contribute to the development of Greece and the exit from the economic crisis. At this stage, however, facing the competition from neighboring countries, in terms of the product offered and target group, differentiation is a one-way road. Thus the Ministry of Tourism and the agencies involved in the tourist product are now in the process of establishing a framework which aims at

the transition from mass tourism to quality tourism. This will include, among other things, modern infrastructure and the modernization of the old one, i.e. the partial or total withdrawal of obsolete units, renewal and the reuse of important buildings or complexes.

It is a fact that quality upgrade cannot be conceptualized separately from spatial upgrade. How feasible is, however, the creation of large tourist facilities nowadays? Should priority be given to the “all inclusive” tourist model and the “ghettoization” of tourist accommodation? International studies predict that future visitors should be able to customize every aspect of their residence experience and the services offered. Is it possible to do so within the context of the large tourist units operation and what is going to happen if all small and medium-sized enterprises continue to operate causing thus aesthetic pollution to the environment?

Based on the principles of sustainability, diversity, development of small and medium-sized businesses and customized services required by the visitor of the future, modernization and refurbishment of the existing tourist infrastructure will promote alternative tourism models. This will be integrated into the residential complexes of each area, giving a personal style to any small unit, so that the visitor finds what he/she wants, tailored to his/her specific needs and requirements.

This tourist model, which is based on customization of services offered, leverages the existing infrastructure because it relies on personal relationships, promotes various types of tourism and enables the extension of the tourist season. The case studies that will be analysed are excerpts of student projects and demonstrate clearly how an existing tourist facility (specifically a city hotel), based on an interesting and strong key idea, can be transformed into a design or boutique hotel with all these quality characteristics listed above. The apparent benefit of this project is the utilization of the existing shell and the enhancement of the place and the services offered.

**Keywords:** Architectural design, tourist facilities, reconstruction, qualitative improvement, building preservation

## INTRODUCTION

It is a general assumption that tourism plays a vital role in Greek economy and is one of the major sources of wealth, making a positive contribution to solving the Balance of External Payments problem. Thus, tourism development in Greece has been established so far by the development laws which first placed emphasis on creating accommodation for tourists only. The uncontrolled tourism development, however, has created major problems. It is for this reason that the latest development laws aim at the upgrade of tourism offer and the maintenance of the environment for the purpose of enhancing the quality of services offered and improving hotel infrastructure.

According to the World Travel and Tourism Council<sup>21</sup>, Greek accommodation for the year 2006 consisted of 9,000 hotels with 600,000 beds and approximately the same number of rented rooms. Only 15 % of those were 4 and 5 stars hotels, while the largest part - about 43 % - were independent accommodation, i.e. rooms for rent of varying quality, apartments and private homes. Also, a large number of luxury hotels required upgrade and modernization. About 50% of total accommodation in the country fell under the low and medium cost options, which produce low efficiency and often unreliable<sup>22</sup> service, mainly due to the seasonality in the tourism industry which often employs seasonal staff.

It is noteworthy that the 4 & 5 stars hotels represent only 15.9% of total Greek hotel units and at the same time 39.2% of total accommodation in the Greek territory (because of their larger average size in relation to the small and medium-sized units). To conclude, we observe that 84.1% of the Greek hotels are up to 3 stars units, while over 60% of the rooms for rent belong to small and medium-sized units (SME).

The Greek hotel market is primarily based on SME units. These are often family businesses employing untrained staff in order to compete with the large units of the competing countries, which have the advantage of economies of scale and professional organization, operation, networking and promotion.

Also under the new Development Law 3908/2011<sup>23</sup>, the 1 and 2 stars hotel units may not receive any subsidy, while the 3 stars units can but in rare occasions. It is therefore understood that a way should be found to make the best possible use of the existing potential of the SME units.

A solution could be the transformation of many of these units into units of high aesthetics, quality infrastructure and high quality service, so as to turn a potential disadvantage to

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<sup>21</sup> World Travel and Tourism Council, The Impact of Tourism on Jobs and the Economy, London, 2006. Report available at <http://www.wttc.org> (access 01/09/2011).

<sup>22</sup> Finding good and qualified staff is difficult, due to the prevailing low estimate of the career prospects in tourism and the notoriety that accompanies many hotel businesses (i.e. offering low wages, irregular working hours and difficult working conditions).

<sup>23</sup> "Strengthening of Private Investment for Economic Development, Entrepreneurship and Regional Cohesion", GG No. 8/01-02-2011.

a strategic advantage<sup>24</sup> Additionally, the Greek hotel market faces the challenge of the extension of tourist season, since the hotel occupancy rate for the year 2006, throughout the Greek territory, is close to or exceeds 50% only for the months of June, July, August and September, while for the rest of the months the occupancy rate fluctuates from 25% to 44%. Survey results (Andriotis 2002b) show that the contribution of accommodation enterprises to the economic development of a place is not uniform.

More specifically, large units employ more outlandish executive staff in relation to the SME ones. Furthermore, larger units tend to buy fewer products from the local markets compared to SMEs, while small businesses employ more people from the familiar environment. Therefore, the smaller the company, the greater is contribution to the local development.

However, the contribution of small scale investments to maintaining control of tourism development of an area is also considerable, having less negative impact on society, leading thus to better integration into the existing socio-political and economic environment and the sustainable development of the area. So it would be appropriate if the development and design agencies were to identify their preferences for the small or large scale investments, depending on the types of tourists they want to attract.

### **3 PERSPECTIVES OF DEVELOPMENT**

According to a survey (Hotels 2020: Beyond Segmentation, Fast Future Research), which predicts tourism development by 2020, visitors should be able to customize every aspect of their residence experience. The traditional way of customer classification will be set aside and be replaced by a series of customized services within the context of creating an integrated customer service model/platform. This means that future guests will be able to adapt every aspect of their travel experience to their requirements, including technology, hotel services, accommodation, travel, expenses and communication. It is also worth noting that the aim should not be a reduction of costs and prices for competition purposes, but a rise in value and quality of the product offered and the hotel services for the consumers.

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<sup>24</sup> See Koutoulas, D., (2006), The Market Influence of Tour Operators on the Hospitality Industry: The Case of Greek Resort Hotels. In: Papatheodorou, A. (ed.). Corporate Rivalry and Market Power: Competition Issues in the Tourism Industry. London: I.B. Tauris Publishers. 94-123

Characteristically, there are some factors advocating for the tourist facilities upgrade: A) The Earth's climate has changed and shall continue to change. Tourism is not only influenced by the environment, but it also significantly affects it. It is very likely that climate change can dramatically affect the future customer behavior in terms of traveling and travel choices in general. Nowadays, the citizens-consumers around the world are increasingly informed of the environmental issues and exhibit increasing environmental awareness. Many tourists are now taking into consideration the «ecological footprint»<sup>25</sup> caused by their journey to the destination• the time is not far-off when this footprint will determine the choice of destination, means of transport and accommodation. It is no coincidence that a constantly increasing number of hotel businesses promote environmentally friendly policies and express their environmentally friendly mindset. In this context, the adoption of a sustainable development model in all issues they face is a one-way road for the viability of these companies.

B) Socio-economic changes have been occurring rapidly in recent years, contributing to the differentiation of the consumerist behavior of tourists worldwide<sup>26</sup> ; consequently, the limited vacation time is replaced by a luxurious holiday, meaning customized, authentic holiday with respect to the local culture and environment.

The traveler is now embracing luxury in the sense of self-fulfillment, experience and “good living”. For these consumers, experience gain and the “exclusive” and customized services are more important than anything else. Moreover, the role of technological innovations in the hotel sector (e.g. “smart” systems for effective management of the department of Food, enhanced systems of personal data security, “smart” lighting systems, alarm clocks which instead of ringing, they gradually dissipate light into the room, etc.) will become increasingly more important for the traveler of tomorrow.

A large part of the potential tourists around the world seem indifferent to the mass tourism model and prefer to differentiate themselves, choosing to escape from the daily routine and enjoy authentic experiences in leisurely pace, away from the tourist hordes. «Slow travel»<sup>27</sup> holiday and

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<sup>25</sup> <http://www.footprintstandards.org> (access 23/07/2011)

<sup>26</sup> SETE, 2010, Greek Tourism 2020: Proposal for a new development model, Tourism as Protagonist in the economic and social development of Greece, Athens, pp. 36-37.

<sup>27</sup> This refers to holidays in serene locations with loose schedule, i.e. going for walks, enjoying local cuisine, exploring urban cities, etc.

the vertical rise of ecotourism are two illustrative examples. These two types of vacation facilitate the development of small units that enable travelers to savor everyday life and/or nature in the places they visit. This type of vacation can be provided by hotels characterized by a small number of rooms, a distinctive architecture and decoration, a provision of personal services and high quality food, as well as the benefits of new technologies.

#### **4 ALTERNATIVE TOURISM OR QUALITY TOURISM**

The alternative or quality tourism and mass tourism can be viewed as “polar opposites”, with the alternative appearing as good and the mass as bad (Lane 1989, 1991, Pearce 1992). As several researchers have noted (Andriot 2003a, Andriotis 2000, EC 1993, Romeril 1985b, Vanhove 1997), the majority of the negative effects of tourism development result from mass tourism, because this type of tourism attracts a large number of people and requires large scale investments and less participation of the local community in the developmental process (Andriotis 2002a, Doggart & Doggart 1996, Faulkner 1998). Mass tourism creates more negative impact on tourist destinations, as it is characterized by a concentration of infrastructure and tourists in space and time and appears less sensitive towards domestic wealth-producing resources, due to the intensive tourism development and the behavior of tourists attracted by cheaper options (Coccossis 1996, Coccosis & Parpairis 1996, Pearce 1989). On the other hand, the alternative tourist is more energetic and engaged in more environmentally friendly activities.

It is a fact that quality upgrade cannot be conceptualized separately from spatial upgrade. This means: a high-level architectural approach underlying both external appearance and interior fitting-out and decoration; a key concept of space design applying to all space as well as to the materials, the equipment and its individual functions; the selection of color and furniture pointing to the creation of a space with a holistic coherence; and, finally, the design focusing particularly on the detail and always taking into consideration the particular hotel location.

#### **5 CASE STUDIES**

##### **TOWARDS A HOLISTIC APPROACH**

##### **VARIATIOS ON THE SAME CENTRAL IDEA.**

The following examples confirm the previous data by applying the concept of central idea to an existing city hotel, altering thus the aesthetic and functional treatment of the areas with a holistic approach but also with respect to sustainability and its effect on the environmental balance. These

are student studies of the 6<sup>th</sup> semester of the department of Interior Architecture, Decoration and Design, TEI of Athens, with supervising instructors Ms. Frangou Dionysia and Mr. Dimitris Marnellos.

The hotel to which the recommendations of redesign are applied, is the Hotel “Amalia”. The hotel is located in Vass. Amalia Avenue no 10, near Syntagma Square and opposite the National Gardens. It was constructed in 1957-1959, architect N. Valsamakis<sup>28</sup>. It is one of the first modern hotels of the downtown postwar Athens, with discreet presence and remarkable durability, despite the subsequent changes mainly of its espace commun s). It began operating in 1960 and has been awarded the Green Key ecological distinction of the Greek Society for the Protection of Nature<sup>29</sup>.

It consists of two basements, a ground floor, six floors and a flat roof, with a capacity of 93 rooms. In the two basements there are the ancillary areas of the hotel, the ground floor and the first floor are the section of the espace commun and the two-storey entrance. The separation of the functions is also expressed in the tripartite arrangement of the facades in base-body-crown. The ground and first floor are the base with the prominent colonnade and the horizontal component of the balcony. The five floors of the rooms which form the body have front side on two levels: the level of wall with the glazing and the protruding surface with the balconies arranged into a square grid. On the side facing the Xenophon street, the facade is formed on one level with glazing and dark marble, partially revealing the skeleton of the building. The recessed roof is the crown. The

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<sup>28</sup> N. Valsamakis (1924 -) manages to combine his commercial success with the qualitative virtues of architecture. He is influenced by the international modernism integrating at the same time elements from the local Greek architecture. He is ranked in the postwar period, with clear influences from Mies Van der Rohe, Le Corbusier, Richard Meier and Luis Barragan.

For the first apartment blocks he designs, he follows the principles of postwar architecture that was developed in Europe and America. These buildings presented *“the manufacturing-typological renewal and morphologically the diversity, asymmetry, the use of materials of different texture· in other words, they showed a concerted effort to overcome the previous indifference to the building type of the apartment block”*.

<sup>29</sup> <http://www.amaliahotelathens.gr/about-the-hotel-gr>



front sides of the hotel are coated with white Pentelic marble<sup>30</sup> and have been declared as a listed building.

It is a hotel in which the architect integrates all those characteristics which made his work stand out. The style of this hotel is characterized as radical for its time. With austere and balanced lines, the use of natural Greek materials and uniform front sides, the hotel draws meanings and values from the Greek tradition and the traditional architecture, combining the old with the new in a unique way. The building with austere and clean forms reveals the essence and qualities of space, without “babbling” with sophisticated components for sensational purposes.

Designed onto a grid in terms of the floor plan and the front sides, the hotel conforms to this orthonormality and in functional solution. The main entrance is located on Vass. Amalia Avenue with clear signage on the outside with a secondary entrance on Xenophon street. The ground floor consists of two levels that follow the slope of the street with the reception at the outer corner of the building. The central stairway lifts in the center of the floor plan leads to the ancillary areas of the basement and the mezzanine floor, where the restaurant used to operate, with expansion to the balconies and view to the National Gardens. The architect’s holistic approach to the design of both the shell and the interior is of great importance.

During the period 2005-2007, the reconstruction of the building took place and essentially only the supporting structure was kept as it was. The front sides were restored as they were, while special lighting was added to highlight them. In terms of the floor plans and spatial organization, it was completely redesigned and nothing refers to the initial organization and planning of the espace commun. So with this intervention, the holistic approach of the building itself with the interior space was essentially split. The core of the central stairway lifts remained in the center of the floor plan of the ground floor integrated into a circular structure which “contains” it. The interior floor level became one unified space, on the ground floor and the mezzanine, where the breakfast area also operates. Two conference rooms were added with the possibility of unification, the reception was moved to the back-blind side of the floor plan, while the bar to the corner-facade of the ground floor.

The reconstruction obeys the logic of globalized continental style, with absence of localization and local characteristics and elements, the design, the architect’s intent for the use of the grid and orthonormality and ultimately the history of the building.

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<sup>30</sup> [http://www.culture2000.tee.gr/ATHENS/GREEK/BUILDINGS/BUILD\\_TEXTS/B114\\_t.html](http://www.culture2000.tee.gr/ATHENS/GREEK/BUILDINGS/BUILD_TEXTS/B114_t.html)

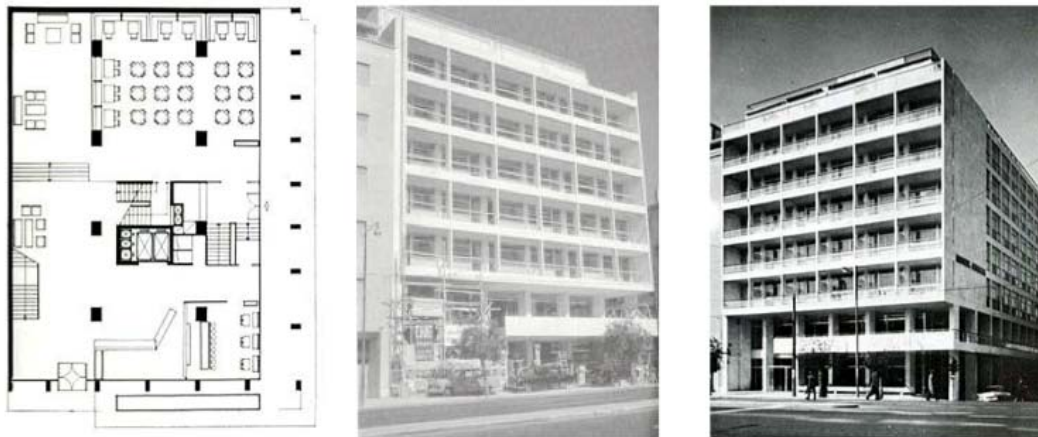


Image 1,2,3: Ground floor plan, Amalia Hotel in 1957 at the time of its completion, *source:* [http://www.culture2000.tee.gr/ATHENS/GREEK/BUILDINGS/BUILD\\_TEXTS/B114\\_t.html](http://www.culture2000.tee.gr/ATHENS/GREEK/BUILDINGS/BUILD_TEXTS/B114_t.html)

In the process of redesigning the interior of the afore-mentioned hotel, the new recommendations are based on the respect for the shell - symbol of modernity -, the spirit of space and place and the intention of the architect (N. Valsamakis), to design based on the grid in terms of the floor plan and the front sides, and orthonormality in terms of the functional resolution, without lacking inspiration and originality. Other factors taken into account are the continuity and consistency of the exterior and the interior, the identity of the building in relation to the time it was built and the architectural viewpoint it professes, the depiction of the architectural viewpoint of the architect who designed it and the continuity-transfer in the design of interior space, using the same or similar morphological tools.

The central idea behind the design of the space should also promote the idea of quality tourism as expressed through the interior design, to propose new ideas and concepts about design and provide solutions to specific problems identified through the preceding local investigation.

The studies presented were chosen for their originality, uniqueness and diversity. The same methodology can be followed in smaller or bigger tourist facilities or tourist accommodation building on existing structures and shells.

### **5.1. Redefining the orthonormal geometry:**

With the given geometry of the building being the central idea and guide, the interior of the building was redesigned, in order to obey the prominent features of the grid. So through this quest for orthonormality, the functional public spaces were created, which in combination with



Figure 4: Reception



Figure 5: Lobby



Figure 6: Bar



Figure 7: Restaurant



Figure 8: Roof



Figure 9: Room

aesthetics attached to them are compatible with the specific front side of the building (Team: A. Politarhou, S. Rezou, M. Kokinopoulou).

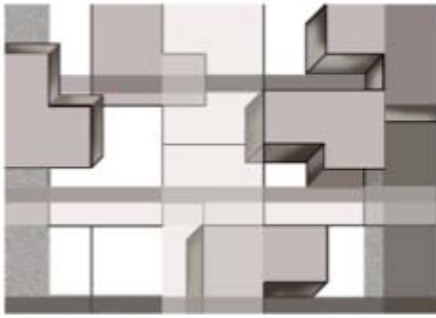


Figure 10: The idea

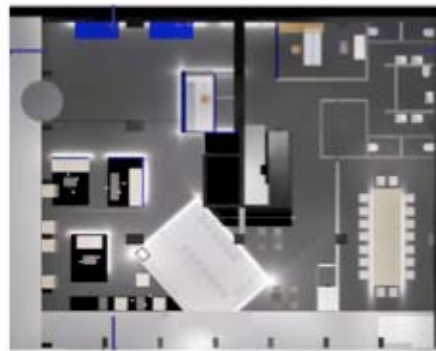


Figure 11: Ground floor



Figure 12: Reception



Figure 13: Lobby



Figure 14: Bar

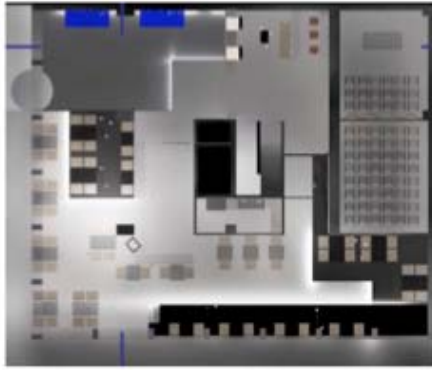


Figure 15: Floor plan first floor



Figure 16: Restaurant



Figure 17: Floor plan Room



Figure 18: Room



Figure 19: Floor plan Roof



Figure 20: Roof

## 2. Three-Dimensional Grid

The original intent of the study is the respect and drawing of the idea from the very architecture of the building, but also from the aesthetics governing the work of the architect of the building. So the central idea of the design and internal configuration of the spaces is the grid, an element with strict geometry and orthonormality. It contains simplicity and timelessness, provides a system of motions and design. The intention is also its deformation, without the orthonormal arrangement being lost, and the parallel lines of which it is consisted, being intersected only at regular intervals. The grid is erected in the three dimensions of space, creates conceivable and non-conceivable spaces, spatial sections one inside the other, extreme but interactive. The target is ergonomics that allows comfort in motion, with the central element of the staircase and the movement around and within it. Materials like the exposed concrete, in the structural elements of the space, the cement mortar on the floors and the cement boards in the constructions of the space, solid wood and black metal sheet give style and any color. Conscious is the differentiation from the established aesthetic of the hotel units with the absence of shiny materials, furniture as well as bold colors and decorative elements. (Team: A. Andreou, S. Kalagkias, A. Lefantzi).

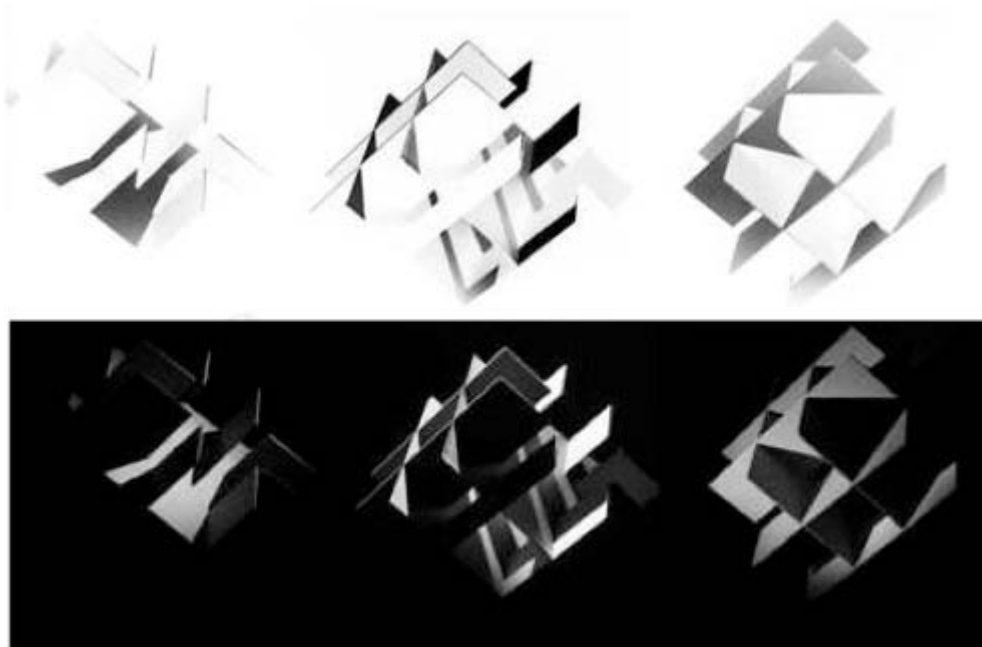


Figure 21: The idea





Figure 22: Ground floor



Figure 23: Reception



Figure 24: Lobby



Figure 25: Bar



Figure 26: Floor plan first floor



Figure 27: Restaurant



Figure 28: Room



Figure 29: Room

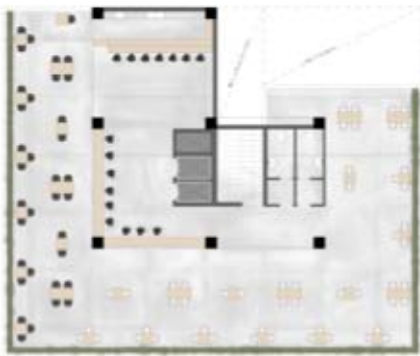


Figure 30: Floor plan Roof



Figure 31: Roof

### 5.3. Space within space

The idea for the design of the space comes from the orthonormality and the geometry of the existing building which is the dominant element. Through the interpretation of this came the need to create “space within space” following its orthonormal floor plan. Through this analysis-processing, the intention of “construction” and “deconstruction” of the dominant material i.e. wood was born, a characteristic feature throughout the space. The other materials that complement the space are essentially the shell itself in neutral tones of gray, the choice of color intensities being the sole exception, using the yellow color in the furniture.

(Team: K. Kina, E. Sofianidou).





Figure 32: The idea



Figure 33: Ground floor



Figure 34: Reception

#### 5.4. Transparent correlations

The project concerns a building located in the city center which is full of life and movement: a central element of the design was the city and its image. The orthonormal shapes, dominant in a city like Athens, the colors and strong motion were important elements for the central idea.



Figure 35: Floor plan first floor



Figure 36: Restaurant



Figure 37: Room



Figure 38: Room

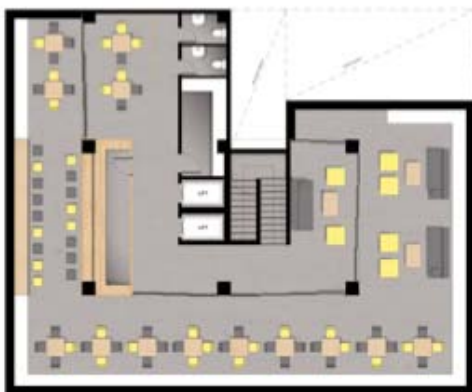


Figure 39: Floor plan Roof



Figure 40: Roof

Forms simple, clean aiming to achieve a leaner and simultaneously dynamic solution, which will highlight the existing building and especially its interior space. The idea is based on a dynamic element, which dominates the area. It is a rectangular element that encloses the central stairway lifts that symbolically and essentially is the binding element of all levels of the hotel. Materials such as wood either in furniture or as vertical elements – walls - partitions (or space dividers) implement this idea. (Team: A. Avgita, V. Bollati, S. Tran, T. Spathas).



Figure 41: The idea



Figure 42: Ground floor



Figure 43: Reception



Figure 44: Lobby



Figure 45: Bar



Figure 46: Floor plan first floor



Figure 47: Restaurant



Figure 48: Floor plan Room



Figure49: Room



Figure 50: Floor plan Roof



Figure 51: Roof



Figure 52,53: The idea





Figure 54: Ground floor

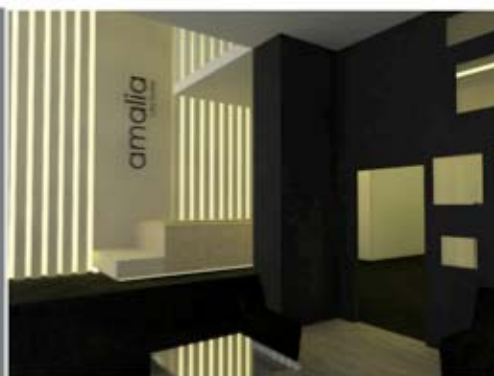


Figure 55: Reception



Figure 56: Lobby



Figure 57: Floor plan first floor



Figure 58: Restaurant

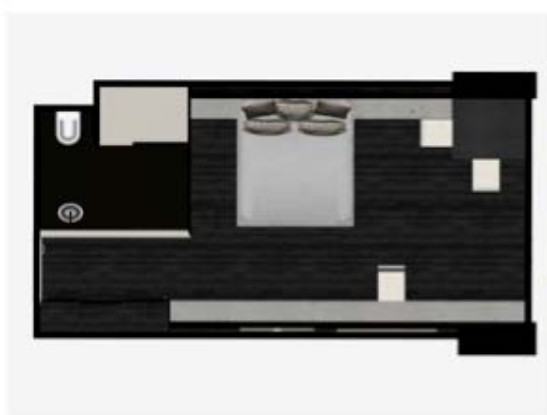


Figure 59: Floor plan Room



Figure 60: Room

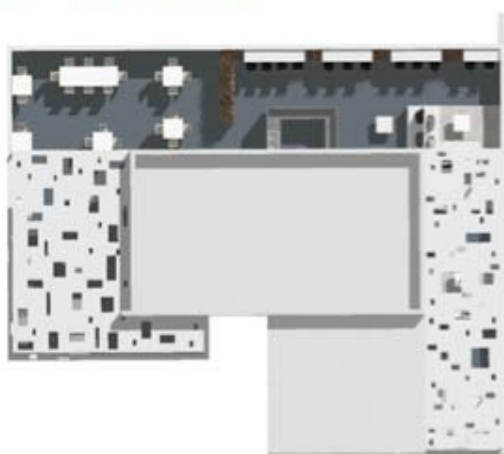


Figure 61: Floor plan Roof



Figure 62: Roof

### 5.5. Suspension and grid

Central idea of the design, except for the element of grid and the rectangular shapes, is a special feature of the shell of the building, as well as of other buildings of the era it was designed, the suspension. The building, as mentioned above, consists of base-body-crown, the base section is none other than the colonnade and glass as a vertical element filling instead of masonry. So this finding of the architect, that the glass-transparent “base” of the building gives the impression that the building is suspended is the basic idea for the design of spaces. Volumes within the hotel premises such as the reception, levels, stairs, walls, construction, and furniture such as tables and chairs, all of which obey the orthonormal logic of the shell, suspend in the way they are designed. This integrative decision is implemented using different color intensities, with full and empty and the use of lighting. So the spaces and constructions - furniture inside them act are complementary and created with the coexistence of one element next to each other like a puzzle. (Team: G. Danochristou, A. Piladarinou).

## 6 CONCLUSIONS

The transition from mass tourism to quality tourism is proven and necessary if tourism is to ensure the modernization of the tourist product offered but also the development of Greece and the exit from the economic crisis. This new tourism model is based on the international trends and developments, the principles that govern sustainability, diversity and development of SME businesses but also the services required by the visitor of the future. Tailored to his/her specific needs and requirements, the model establishes the customization of services offered, leverages the existing infrastructure, relies on personal relationships, promotes various types of tourism (conferences, religious or medical meetings, etc.) and enables the extension of the tourist season. In so doing, modernization and renewal of existing tourist infrastructure is achieved, promoting thus alternative tourism models integrated in the residential complexes of each area and giving a personal style to any small or larger unit. Therefore, the visitor-tourist finds what he or she wants, develops personal bonds with the place and people, reinforcing at the same time the dynamics of the Greek tourism product.



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